ECCO®

User's Guide

Version 4.01

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ECCO User's Guide, Version 4.01

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Notice

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Chapter 1. Introduction

ECCO® Pro 4.01 is an Information Manager that provides all the tools you need to simplify your life — an easy-to-use PhoneBook and Calendar for keeping track of the appointments and people you deal with daily, and Notepads that let you organize information in ways to best suit your needs.

Rather than forcing you to accept predefined categories, ECCO gives you the tools to create your own organizational structure:

- Record and view information in the three ECCO views — PhoneBook, Calendar, and Notepad.
- Use ECCO Pro to cross-reference, collect, and associate values with items of information.
- Share information and schedule group meetings with other users by using ECCO's networking features.

Increase Your Productivity with ECCO

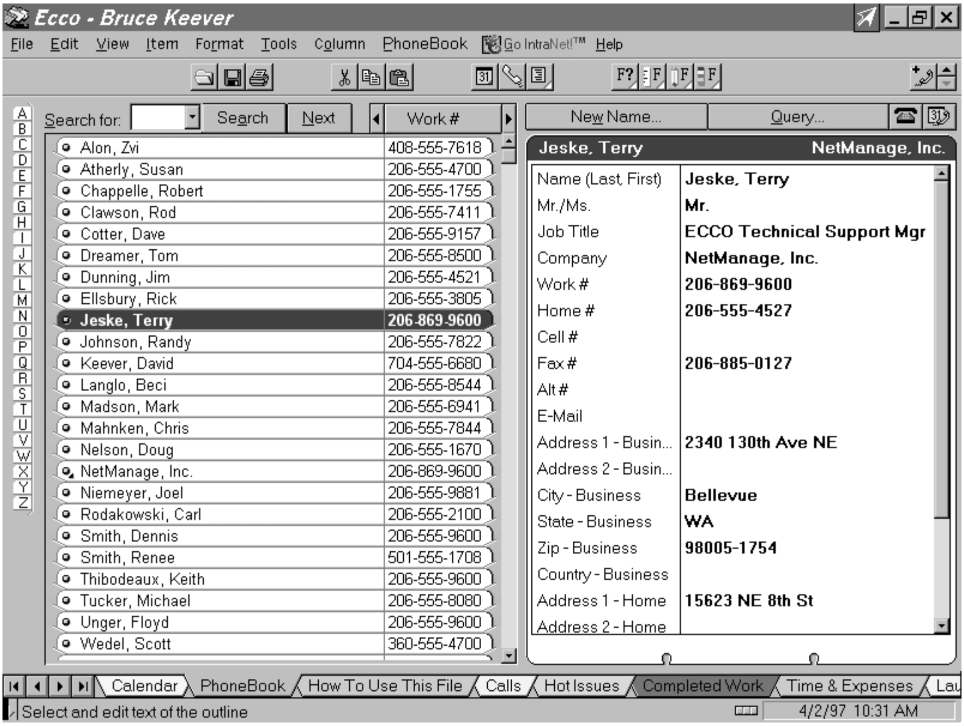
Even if you have never before used a computer to manage your daily information, you'll be surprised at how quickly ECCO can save you time and help you work more effectively. ECCO provides you with three primary tools — the PhoneBook, the Calendar, and Notepads.

The PhoneBook

Need a phone number fast? Can you remember only the person's first name and the fact that you met at the Dallas convention? Don't bother fumbling through a pile of business cards with notes scrawled on the back. ECCO's PhoneBook gives you instant access to names, phone numbers, and personal notes for the people important to you.

You can also create customized PhoneBook forms, add new fields, and add outlines notes to include contact histories. If you are using a modem, you can have ECCO dial your PhoneBook entry and automatically log the call. Filters and queries add the power a paper address book simply can't match.

The PhoneBook



The PhoneBook provides you with a customizable PhoneBook entry form for entering new names and a phone list for viewing them:

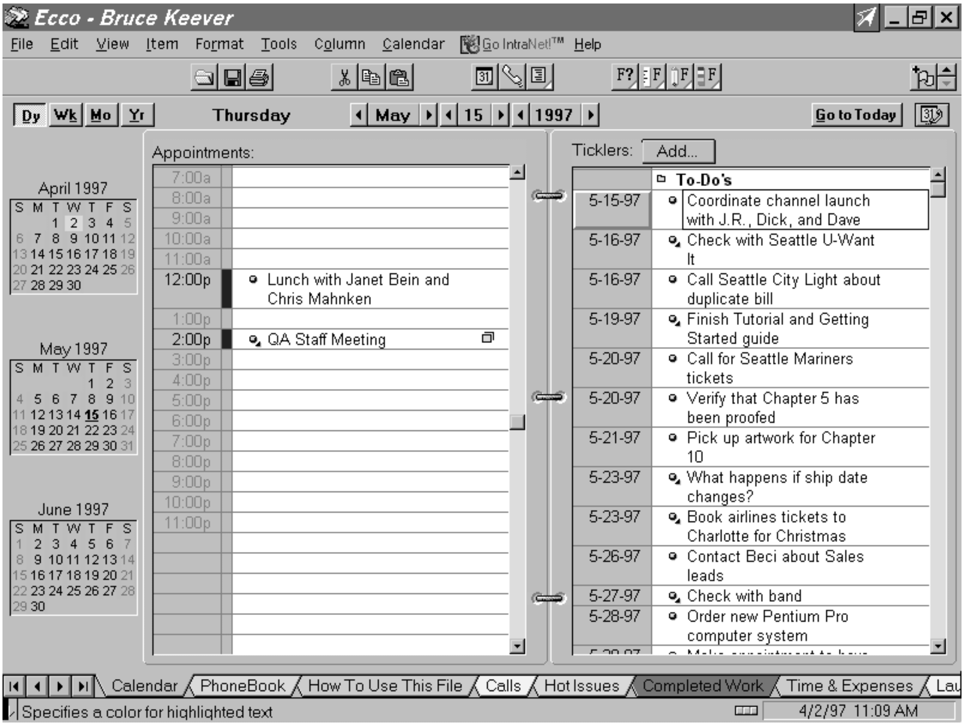
- Quickly find the information you need by searching by first name, last name, or company.
- Keep a full record of your conversations by adding outline notes to your PhoneBook entries.
- Display, in spreadsheet-like columns, information such as phone numbers, addresses, records, and phone conversations.
- Dial and log phone calls automatically.
- Customize the PhoneBook entry form to display only those fields into which you customarily enter information.

For more information, see the chapter or online help on “The PhoneBook.”

The Calendar

With ECCO's Calendar, you'll always have an answer to the question "What do I have to do next?" All your scheduled appointments and events are displayed for quick reference. A Busybar shows you at a glance when you are busy and when you have a free time slot. "Tickler" reminder notes and customizable alarms for your appointments take the pressure off your memory skills. Recurring events such as monthly progress reports, a weekly lunch, or an annual physical are automatically scheduled for you with a simple menu selection. And because no one's schedule is immune to changes, ECCO makes it easy to rearrange your appointments by using the mouse to drag them to a new time or date.

The Calendar



The Calendar provides day, week, month, and year views for recording and viewing appointments and a tickler section for recording and viewing to-do's and reminders:

- Include outline notes for any appointment or to-do item.
- Set alarms that notify you of appointments and events. You can create multiple alarms for each appointment or to-do.
- Create recurring appointments and to-do's automatically, at the time intervals you specify.

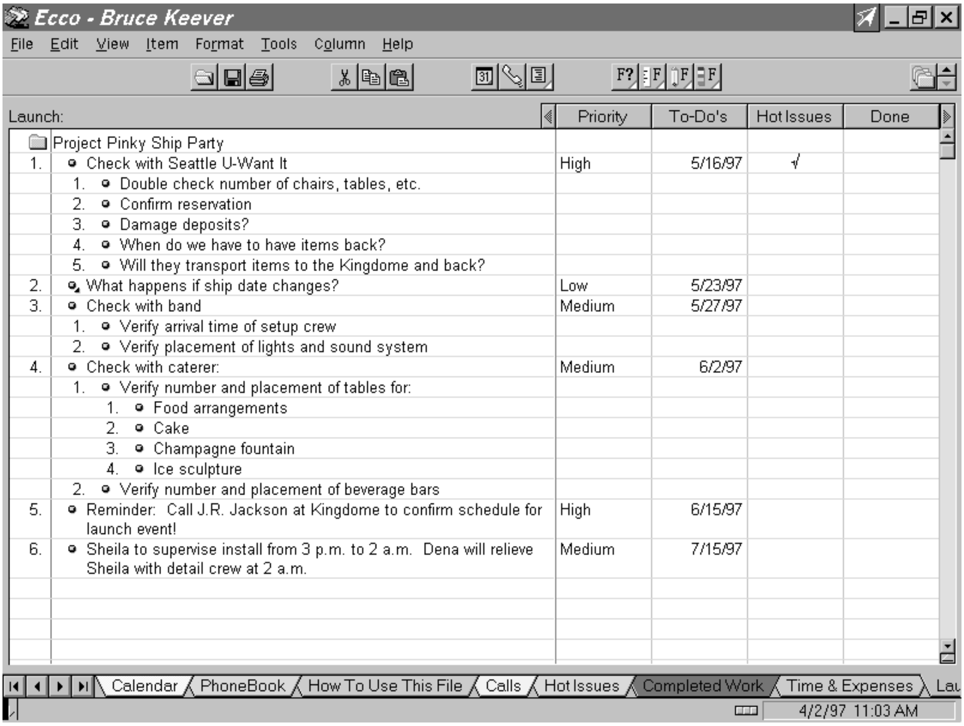
For more information, see the chapter or online help on “The Calendar.”

You can also use the ECCO Calendar to schedule group meetings with other people on your network. For more information, see the chapter or online help on “Group Scheduling.”

The Notepad

If you think back on a typical day, you’ll likely realize that most information you deal with doesn’t easily fall into neat categories. ECCO’s Notepads are outlining tools that give you the opportunity to record information in a way that best suits your needs. Use a Notepad to keep lists of major and minor points, track a new business plan, or record the highlights of a recent seminar that you want to remember.

A Notepad



Note: Outlining isn’t limited to the Notepad — it is a basic feature available in all ECCO views (Calendar, PhoneBook, and Notepads).

For more information, see the chapter or online help on “The Notepad and Outlining.”

Other ECCO Features

In addition to ECCO views, other features help you find, organize, and view the information you use every day:

- Click the right mouse button to display a pop-up menu that lets you execute commands for the current view as well as common Edit-menu operations.
- Use the ECCO Shooter® to copy information between ECCO and other programs.
- Search any ECCO view or file for a group of text items and place them in a separate Notepad.
- Customize the toolbar for instant access to any ECCO command.
- Customize the Tools menu for instant access to other programs and files.
- Format text using outline styles, character formatting, and text touch-ups.
- Share files and schedule group meetings with other users on your network.
- Place the same item in multiple ECCO folders simultaneously, the Folder window. You can then view those items with other related items, from many perspectives.
- Add additional information (such as dates or numbers) to items in a view, using columns in the column pane.
- Limit and order the display of items in a view, using filters and sorting.
- Add items and their associated values to multiple folders at one time, using forms.
- Export phone numbers, appointments, and to-do’s to a Timex Data Link watch.
- Synchronize data between the U.S. Robotics Pilot and your ECCO file.

Documentation Roadmap

You are provided with a variety of learning tools to ensure that you can learn ECCO in a way that best suits your needs:

- **ECCO Getting Starting Guide:** A hands-on approach to learning that walks you step-by-step through ECCO basics and some intermediate features such as group scheduling and file synchronization. This printed guide is included with ECCO and also available in Adobe Portable Document Format (PDF) on the ECCO CD-ROM.
- **ECCO User’s Guide:** Your comprehensive guide for working with ECCO. The User’s Guide is available in Adobe Portable Document Format (PDF) on the ECCO CD-ROM, which allows viewing and printing of any part of the User’s Guide. The content of the User’s Guide is also contained in the online ECCO Help system. Printed User’s Guides are available for a nominal charge. Please contact NetManage ECCO Customer Service for ordering information (see the following section).
- **Online Help:** An online version of this User’s Guide. To access online help, choose one of the commands from the ECCO Help menu or press F1.

- **TECHINFO.ECO:** This ECCO file contains troubleshooting information and other technical reference information for using ECCO.
- **README.WRI file:** This file contains helpful information that was not available when this manual was printed. This file can be opened with either Microsoft Write or Microsoft WordPad, included with Microsoft Windows 3.x and 95, respectively.

Note: The documentation set for ECCO Pro 4.01 includes information on all platforms (Windows 3.1, Windows NT, and Windows 95). Any differences in ECCO features on a specific platform are noted in the text. Though all pictures in the printed and online documentation were created with the 32-bit version of ECCO Pro, the same features and commands described in the pictures are available in the 16-bit version.

ECCO Technical Support and Customer Service

If you need additional information or cannot find the answer you need in the printed or online documentation, call NetManage ECCO Customer Support at (206) 885-0559. Telephone support is available Monday through Friday, 7 a.m. to 5 p.m. Pacific time, excluding holidays.

If you have questions about your product registration, need pre-sale information, or want to purchase additional copies of ECCO, call NetManage ECCO Customer Service at (206) 885-4272. Representatives are available weekdays 6 a.m. to 6 p.m. Pacific time, excluding holidays.

ECCO Online

The following online options provide 24-hour access as well as file libraries for downloading technical notes, additional templates, and maintenance releases. Suggestions and comments are also welcome.

Service	Access
News Server	forum.netmanage.com
	Newsgroups: netmanage.products.ecco.discussion netmanage.products.ecco.misc netmanage.products.ecco.network netmanage.products.ecco.sales netmanage.products.ecco.support netmanage.products.feature-request
Internet	eccosupport@netmanage.com [technical support]
	eccoservice@netmanage.com [customer service]
FTP Server	ftp.netmanage.com

Other NetManage Products

NetManage is committed to expanding network capabilities in line with existing products, such as ChameleonNFS/X™ for all Windows platforms. We will maintain our high standards for ease of use and integration with Windows.

Our current set of products includes:

- ChameleonNFS/X™: TCP/IP applications suite for Windows systems, including NFS client and server for Windows systems, plus Xoftware for X-Windows.
- Chameleon HostLink™: comprehensive TCP/IP application suite including IBM mainframe, AS/400, and UNIX/VMS host access for SNA, TCP/IP, and asynchronous connections.
- IntraNet Forum Server: A high-end IntraNet discussion server, based on the Network News Transport Protocol (NNTP).
- Internet Chameleon™: Internet dialup access
- NEWTWatch: SNMP-based desktop management
- NEWT-SDK: Development kit for TCP/IP DLL, FTP DLL, SMTP DLL, SNMP DLL, and ONC RPC/XDR.
- NEWT IntraNet ActiveX: Development kit for ActiveX Controls.
- ECCO Pro™: Personal information management and workgroup communications application.
- Z-Mail Pro™: Set of e-mail related applications that let you send and retrieve electronic mail.

We also have native-language versions of some of our products in:

- Chinese
- Dutch
- French
- German
- Italian
- Japanese
- Korean
- Portuguese
- Spanish

Chapter 2. Setup and Installation

ECCO Pro 4.01 System Requirements

Before installing ECCO, be sure your computer meets the minimum system requirements:

- IBM PC, PS/2, or 100% compatible computer
- Mouse or other pointing device
- Microsoft® Windows® 95 or Windows NT 3.51 or later operating systems (Windows 3.1 or higher for ECCO Pro 16-bit version)
- 8 megabytes (MB) of RAM (12 MB or more recommended)
- 12 MB of free hard disk space for minimum install; 16 MB for full install
- CD-ROM drive
- Hayes®-compatible modem is required to use the Phone Dialer feature and fax modem for Correspondence Manager faxing features

Installing ECCO

When you insert the ECCO Pro 4.01 CD into your CD drive, the setup program automatically launches if your system has CD autoload enabled (which is the default in Windows 95 and Windows NT 4.0).

Before installing ECCO, exit any virus checking or screen saver programs

To install ECCO Pro for Windows 95 or Windows NT 4.0

1. Insert the ECCO Pro CD into the CD drive.
2. An autostart program will automatically initiate the installation process.
3. When the installation wizard prompts you, specify the folder into which you would like the ECCO Pro 4.01 files to be installed.
4. When the installation wizard prompts you, specify the files you want to be installed by checking the appropriate checkboxes. All files are selected by default.
5. When the installation wizard prompts you, specify a program group in which to place the icons for ECCO Pro.

   You can cancel the installation at any time by choosing the Cancel button. To proceed to the next panel of the wizard, choose Next. If you want to change information you have previously entered, choose the Back button.

The last panel of the wizard has a Finish button. Choose the Finish button to begin the installation. When the installation is complete, a dialog is displayed confirming a successful installation of ECCO Pro.

Note: For upgrade installation information, see the README.WRI file in the installation directory of the ECCO Pro CD.

To install ECCO Pro for Windows 3.1x and Windows NT 3.51

1. Insert the ECCO Pro CD into the CD drive.

2. In Program Manager, choose the Run command from the File menu.

3. When the installation wizard prompts you, specify the directory into which you would like the ECCO Pro 4.01 files to be installed.

4. When the installation wizard prompts you, specify the files you want to be installed by checking the appropriate checkboxes. All files are selected by default.

5. When the installation wizard prompts you, specify a program group in which to place the icons for ECCO Pro.

   You can cancel the installation at any time by choosing the Cancel button. To proceed to the next panel of the wizard, choose Next. If you want to change information you have previously entered, choose the Back button.

   The last panel of the wizard has a Finish button. Choose the Finish button to begin the installation. When the installation is complete, a dialog is displayed confirming a successful installation of ECCO Pro.

Note: For upgrade installation information, see the README.WRI file in the installation directory of the ECCO Pro CD. You may also access the README.WRI file by choosing the ECCO Pro README button on the first panel of the installation wizard.

Starting ECCO

After you have installed ECCO, you are ready to start the program.

To start ECCO

1. Start Microsoft Windows 95, Windows NT, or Windows 3.1x.

   For more information about running Microsoft Windows 95, Windows NT, or Windows 3.1x, see your Microsoft Windows documentation.

2. Choose the Start button on the Windows taskbar, select Programs on the Start menu, then NetManage ECCO Pro, then NetManage ECCO 4.0.

   Or if using Windows NT 3.51 or Windows 3.1x:

Open the ECCO program group, if it is not already open and double-click the ECCO icon.

The ECCO program window appears. It remains empty until you create a new file or open an existing file.

To Create a New File

From the File menu, choose New. ECCO opens a new, untitled file based on the template DEFAULT.ECT.

To Open an Existing File

1. From the File menu, choose Open. The File Open dialog box appears..
2. In the File Name box, type or select the name of the file you want to open.
3. If the file you want to open is not listed, specify the location in which you saved the file with the appropriate dialog box options.
4. Select the name of the file you want to open, and then choose the OK or Open button. ECCO opens the file.

Note: ECCO lists the last four files you closed at the bottom of the File menu. To open a recently closed file, choose it from the menu.

Using Templates

An ECCO template is a file (with the extension .ECT) that you can use as a model to create other files of the same type. Because templates contain views with predefined folders and columns tailored to specific professions, they can help you become productive quickly. For example, the Sales template (SALES.ECT) is specifically designed to meet the needs of sales professionals.

Each ECCO template includes a view titled “How to Use This File” that describes how to get the most out of each template.

To Create a New File Based on a Template

1. From the File menu, choose Open.

   The File Open dialog box appears.
2. In the List Files Of Type box, select the ECCO Templates (*.ECT) option.
3. Select the TEMPLATE folder.

   A list of all available templates appears.
4. Select a template.
5. Choose the OK or Open button.

ECCO opens a new, untitled file based on the template you selected.

To Create a New Template

You can create a template based on any ECCO file.

1. Open the file on which you want to base the new template.
2. From the File menu, choose Save As.

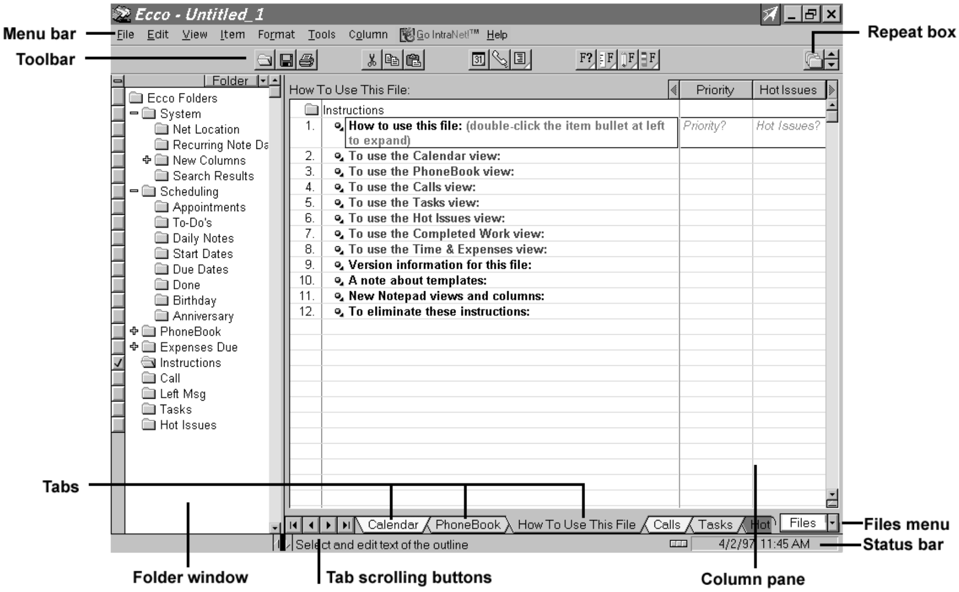
   The Save As dialog box appears.
3. In the File Name box, type a name for the template.
4. Specify the location in which you want to save the file.
5. In the Save File Type As box, select the ECCO Templates (*.ECT) format.
6. Choose the OK or Save button. ECCO saves the file as a template.

Note: Once you're familiar with ECCO, you might want to create a custom file that has no predefined template information. To do so, press the CTRL or SHIFT key while you choose New. ECCO will create a file that contains only a PhoneBook and a Calendar. You will have to explicitly create any desired Notepads.

Navigating in ECCO

In this section, you'll learn the features of the ECCO program window and the basics of ECCO navigation. Familiarity with the Microsoft Windows 95, Windows NT, or Windows 3.1x graphical environment is assumed. If you need more information, refer to your Microsoft Windows documentation.

The following illustration (which displays a Notepad for demonstration purposes) shows the key features of the ECCO program window:



The following table describes the key features of the ECCO program window:

Feature	**Description**
Menu bar	Contains main ECCO menu names. Choose a menu name to display a drop-down list of commands.
Toolbar	You can speed up your work by using command buttons located on the toolbar. You can customize the toolbar to contain the ECCO command buttons you use most often.
Repeat box	Choose the Repeat box to repeat the command last chosen or to customize the toolbar (by using the right mouse button to drag the button that appears in the box).
Column pane	An area of each view in which you can display columns to enter and display values such as dates, numbers, and check marks.
Tabs	You can move from one ECCO view to another by clicking a tab.

Feature	Description
Tab scrolling buttons	Appear when there are more tabs than can be displayed at one time. Choose the button on the far left to display the first tab; choose the second button from the left to display the previous tab; choose the second button from the right to display the next tab; choose the button on the far right to display the last tab.
Status bar	Displays the current date and time as well as information about the selected command, and it indicates whether a filter has been applied to the active view. It also contains the Show/Hide Toolbar button and context-sensitive help messages.
Files menu	Appears whenever multiple ECCO files are open. Use the Files menu to switch from one open file to another.
Folder window	You create and organize folders in the Folder window. You also use the Folder window to edit existing folders, view folder types, change folder preferences, add items to folders, and remove items from folders.

ECCO Views

An ECCO file has three main views — the Calendar, the PhoneBook, and the Notepad.

Each ECCO view is a window. Each ECCO window can display three additional views at one time. For example, if you are in the Calendar, you can “add” a Notepad to the Calendar so that the Notepad and the Calendar are displayed side by side.

To Switch between ECCO Views Using the Menu Bar

From the View menu, do one of the following:

- To switch to the Calendar, choose Calendar.
- To switch to the PhoneBook, choose PhoneBook.
- To switch to a Notepad, choose Notepads, and then choose a notepad name from the submenu.

To Switch between ECCO Views Using Tabs

Choose the tab for the view you want to see.

Note: You can also switch between views by using the keyboard or the toolbar. For more information about customizing the toolbar, see the online help or chapter on “Using the Toolbar.”

ECCO Files

In ECCO, you can have multiple files open at one time and move between them as you work. You switch to another open file using the Files menu. The Files menu is displayed in the lower-right corner of the ECCO Program window whenever multiple files are open.

To Switch between ECCO Files

From the Files menu in the lower-right corner of the ECCO program window, choose the file you want.

Saving an ECCO File

When you select Save from the File menu, you save all changes made in any view in the active file. You can set save options for all your ECCO files such as autosave every *x* minutes and autosave on file close or file-specific backup options, such as keeping multiple rotating backups and daily backups to a network.

To Save an ECCO File

1. From the File menu, choose Save.
    - If you are saving an existing (previously saved) file, ECCO simply saves the file under the existing name to the location specified when you last saved the file.
    - If you are saving a new, unnamed file, ECCO displays the Save As dialog box. Follow steps 2 through 4 to complete the process.
2. In the File Name box, type a name for your file.
3. Specify the location in which you want to save the file.
4. Choose the OK or Save button.

To Set Save Options

To customize the saving process, use the save options in the ECCO Options property sheet.

1. From the Tools menu, choose Options. The ECCO Options property sheet appears.
2. On the Files tab, select one or more of the following:
    - To save your file automatically at a regular interval, select the Autosave All Files Every option, and then select a time interval from the list.
    - To save automatically on closing without a prompt, select the Autosave on File Close option.
3. Choose the OK button.

To Set File Specific Save Options

1. From the File menu, choose Properties. The File Properties property sheet appears.

2. On the Backups tab, select one or more of the following:

   - To save backup copies, in the Local Backup section check Keep Backup Copies of This File and enter number of backup copies you want ECCO to save. Each time you exit, ECCO creates a new backup copy with the extension .BK1 (the most recent backup), .BK2, and so forth, up to the number specified.
   - To save a copy of your file to a network directory automatically on closing, select Save a Daily Backup to the Network in the Network Backup section, and then specify the network location in which you want to save the file.

Closing Files and Exiting ECCO

When you are finished working with an ECCO file, you have two options — you can close it and remain in ECCO, or you can close it (along with all other open files) and exit ECCO.

To Close the Active File and Remain in ECCO

From the File menu, choose Close. If you have not saved changes, ECCO asks whether you want to save them.

To Close All Open Files and Exit ECCO

From the File menu, choose Exit. If you have not saved changes, ECCO asks whether you want to save them.

Chapter 3. The Calendar

About the Calendar

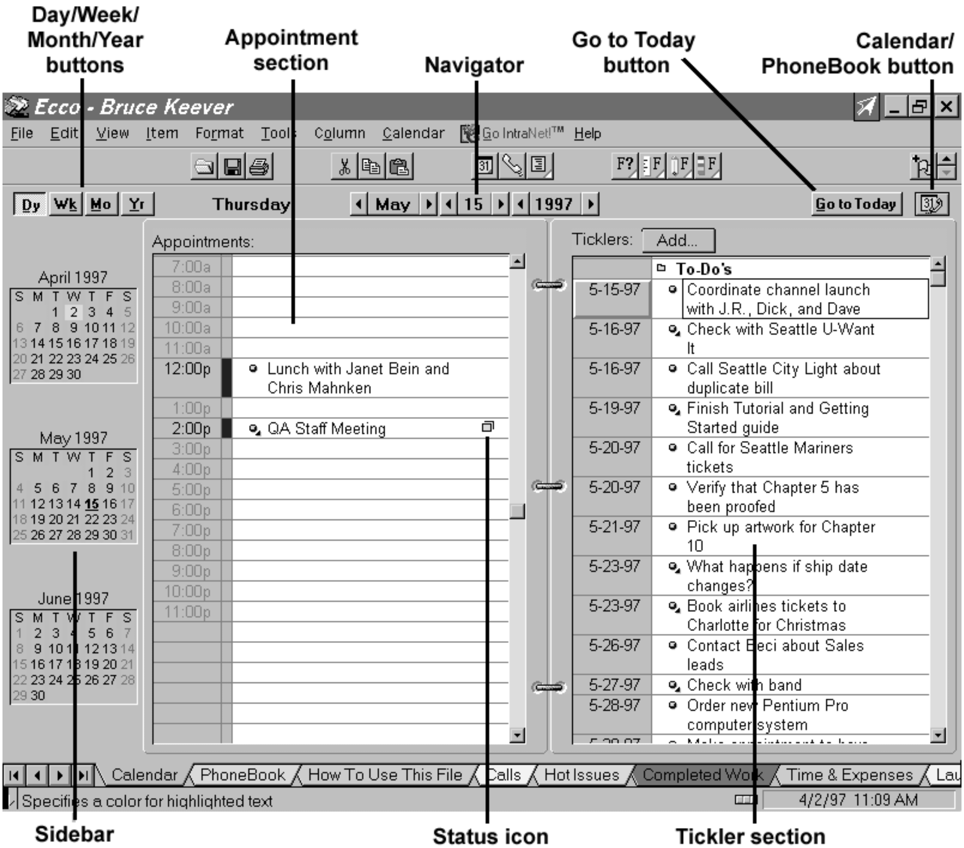
Use the Calendar to record appointments on your computer just as you use a paper organizer or other paper calendar. Once you've recorded your appointments, ECCO gives you a number of ways to save yourself time and keep your schedule on track—ways that a paper calendar doesn't provide, such as:

- **View your schedule** a day, a week, a month, or a year at a time.
- **Schedule an appointment** by clicking in the Appointment section, or by dragging a name from your PhoneBook or from any Notepad to the Calendar.
- **Remind yourself of to-do's and upcoming appointments** with a list of tickler items. Just click in the Tickler section to add a reminder.
- **Set alarms** that notify you of appointments and events.
- **Create recurring appointments and events** automatically, at the time interval you choose.
- **Store important information** about your appointments and tickler items with outline notes.
- **Use columns to give priority or other values** to your appointments and tickler items.
- **Schedule group meetings** with anyone connected to your ECCO Workgroup Directory. For more information, see the chapter or online help on "Group Scheduling."

The Date Settings dialog box is a compact tool for specifying settings for your appointments, tickler items, alarms, recurring events, and Busybar block colors.

The Calendar Window

The Calendar window appears inside the ECCO program window. To switch to the Calendar, choose Calendar from the View menu or click the Calendar tab.



- **Day/Week/Month/Year buttons:** Switches between daily, weekly, monthly and yearly views of your calendar.
- **Navigator:** Lets you travel backward and forward through your calendar. ECCO immediately displays the appointments and tickler items for the dates you specify.
- **Go to Today button:** Instantly returns you to the current date.
- **Calendar/PhoneBook button:** Displays the Calendar and PhoneBook side by side. You can drag names from the PhoneBook to the Calendar to schedule an appointment in the Appointment section.
- **Sidebar:** Displays "thumbnail" calendars of the current, previous, and next month, or it displays a Busybar that shows your appointments in timeline form.
- **Appointment section:** Create and modify your appointments here. You can also add information in outline form for each appointment item you schedule.
- **Status icons:** Show you at a glance the items with associated alarms and items that are recurring events.

- **Tickler section:** Displays reminders that "tickle" your memory about things you need to do or upcoming appointments you need to prepare for.
- **Add Tickler button:** Displays the Add Tickler Item dialog box.

Viewing Your Schedule

As you plan and create your appointments and to-do's, you might want to look at one day's events in detail or get an overview of the weeks, months, and year to come. There are five ways in which to view your schedule:

- Move through the Calendar a month, day, or year at a time.
- Move to today's date by choosing the Go To Today button.
- View a particular day, or a week, month, or year at a time, using the Day, Week, Month, and Year buttons.
- Display weeks and months in detail, or in a summary "planner" format.
- Use the sidebar to display three months at a glance, and move to any date by clicking it. Or, display busybars showing your scheduled appointments in timeline form.

Moving To A Date

ECCO offers you four ways to move to any date in your Calendar:

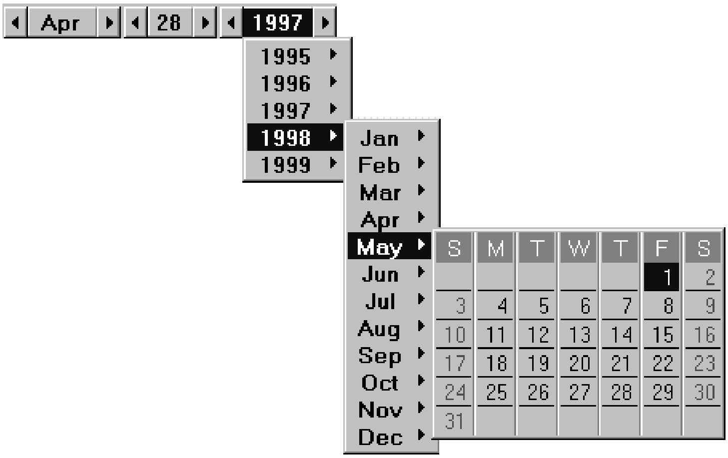
- Select a date using the Navigator.
- Use the keyboard shortcuts listed below.
- Click a date in the sidebar.
- Choose the Go to Today button to return to today's date.

The Navigator displays the currently selected date of the active Calendar and lets you select any date:

- Click the text of the Navigator buttons to display drop-down lists of months, days, and years, and choose the one to which you want to move.
- Click the arrow buttons to move forward and backward by month, day, or year. These buttons will either move you directly to a different date or will display a set of days, months, or years from which to choose.

For example, to go from April 28, 1997 to May 1, 1998, you would make selections that result in the following screen display:

Use the Navigator's drop-down lists to move to a specific month, day, or year.

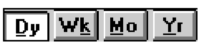


You can also move quickly between dates by using the following keyboard shortcuts:

To	Press
Go to today	ALT + G
Go to date—specify date or number of week	F4
Go to previous year	F5
Go to next year	F6
Go to previous month	F7
Go to next month	F8
Go to previous day	F9
Go to next day	F10

Viewing Your Schedule by Day, Week, Month, or Year

Click the Day, Week, Month and Year buttons (at the far left of the Calendar window) to view your schedule for the day, week, month, or year of the date displayed in the Navigator. The Tickler section also changes to reflect the reminders you have created for the selected day, week, month, or year.



Displaying Weeks and Months in Summary or Detail

The ECCO Calendar can display the selected week or month in detail (as a scrolling list of your appointments) or in summary (a graphical display of squares that resembles a "planner" paper calendar, showing your appointments and, optionally, your tickler items). A black bullet appears below the number of the currently-selected date.

Note: When you display your appointments by week or by month in detail, you can expand or collapse the appointments for a day by double-clicking the folder icon to the left of the day, or jump to a particular day by clicking that day in the sidebar.

To customize the font size of text in the week and month summary displays, press the Font button (between the Navigator and the Go to Today button).

To switch between detail and summary displays

Do any of the following:

- In either summary or detail display, click the Detail/Summary button on the Calendar toolbar.
- In either summary or detail display, press SHIFT + F10.
- In a summary display, click a date and, from the pop-up menu, choose Go to Day.
- In a summary display, double-click anywhere in a date.

  ECCO displays in detail the day display of the date you selected.

ECCO remembers your display choice the next time you view the Calendar by week or month.

To select a date in a summary display

Do any of the following:

- Use the Navigator
- Click in the sidebar
- Click anywhere in a date square

When you click a date, a pop-up menu opens, including commands for:

- Adding, deleting, or modifying an appointment, multi-day appointment, or tickler item
- Adding a group meeting
- Displaying the selected day in detail

Choose a command, or press ESC to close the pop-up menu.

Note: You can also change an appointment or tickler item by dragging it to any other date in the current week or month.

To display or hide tickler items in summary displays

1. From the Calendar menu, choose Options.

   ECCO displays the Calendar Options property sheet.

2. Choose the Ticklers tab.

3. Select or deselect the Week and Month options under Show Ticklers in Summary Views for.

4. Choose OK.

To display day details in summary displays

1. Click the date and, from the pop-up menu, choose Show Day Details.

   ECCO displays the Day Details dialog box. The text box displays the full text of any items associated with this date.

2. Choose the Go to Day button to view the Calendar by day, or choose the Done button.

Using the Sidebar and Busybars

The vertical sidebar at the left-most side of the Calendar displays either:

- Three-month “thumbnail” calendars.
- A Busybar, which shows your appointments and recurring events in timeline form by day, week, or month. Each appointment or event appears as a colored Busybar block.
- No Busybar.

The three-month calendar displays the month selected in the Navigator and the months immediately before and after it. The Busybars display the day, week, or month of the date currently selected in the Navigator. These Busybars are independent of the way your schedule is displayed (using the Day, Week, Month, and Year buttons). For example, you can display today’s appointments, and have the Busybar show your busy periods for the entire month.

You can specify a different busybar for each calendar display.

To change the sidebar display

1. From the Calendar menu, choose Sidebar Shows.

2. From the submenu, choose one of the following:

To hide the sidebar, choose No Sidebar.

To display “thumbnail” calendars of the next, previous, and current months, choose Three Months.

To display a Busybar, choose Day Busybar, Week Busybar, or Month Busybar.

Note: Click the right mouse button in the sidebar to open a pop-up menu containing these same commands.

To change an appointment’s time, drag the middle of its Busybar block to a new position in the Busybar.

To change appointment’s duration, drag either end of its day or week Busybar block to make it longer or shorter. As you drag, ECCO displays the duration in 15-minute increments.

Each appointment’s Busybar block can have any color you specify in the Date Settings dialog box or the Edit Appointment or Tickler Item dialog box.

Customizing the Calendar’s Appearance

ECCO offers you a number of ways to customize the Calendar’s appearance. You can set default options, specify international date and time formats, and display the Tickler section above or beside the Appointment section.

To set calendar options

1. From the Calendar menu, choose Calendar Options.

   ECCO displays the Calendar Options property sheet.

2. Choose the Appointments tab to:

   - Start the week on Monday instead of Sunday.
   - Change the start and end times of your day.
   - Change the default appointment duration (for example, from one hour to a half hour).
   - Change the default appointment time slot that appears in the Calendar.
   - Change standard settings for appointment items.

3. Choose the Ticklers tab to:

   - Show or hide tickler items in the week and month summary views.
   - Show the Tickler section to the right or on top of the Appointments section.
   - Change standard tickler item options.

4. Choose the Time Zone tab to:

- Set the primary time zone for group scheduling.
- Set time zone adjustments.

5. Choose the Holidays tab to:
   - Select the country for which you want to view national holidays. Select none for no holidays.
   - Create, edit, and custom holidays.
6. Choose the OK button.

   The Calendar changes to reflect the options you specified.

ECCO automatically uses the country and language set in the Regional Settings option on the Control Panel (in the Windows NT 3.51 Control Panel use the International option) to determine time, date, number, and currency formats. For example, if you specify the country as Sweden, the Navigator and all dates change to year/month/day order, and times are displayed using the 24-hour clock.

You can resize the Tickler section and Appointment section by dragging the bar in between them (the pointer becomes a double-headed arrow). If a section disappears, press F12 to reopen it.

By default, ECCO displays the Appointment section and Tickler section side by side; however, you can choose to arrange them vertically.

To rearrange the Appointment and Tickler sections

1. From the Calendar menu, choose Options. ECCO displays the Calendar Options property sheet.
2. Select the Ticklers tab.
3. Under Tickler Section Position, select either On Right Side of Appointments or On Top of Appointments.

   You can also change the Tickler section position when in the a Calendar detail view by selected Show Tickler Section on Top from the Calendar menu.

Note: ECCO is sensitive to state of your computer screen, so this command may be unavailable if the active ECCO window is crowded or if your monitor display is at a low resolution.

To add a customized holiday

1. From the Calendar menu, choose Options.

   ECCO displays the Calendar Options property sheet.
2. Choose the Holidays tab.

3. Choose the Custom Holiday button.

   The Manage Custom Holidays dialog box appears.

4. Choose the New button.

   The Custom Holiday dialog box appears.

5. Specify the date and type a description of the holiday in the Title text box.

6. Choose OK, and then choose the OK button in the Manage Custom Holidays dialog box.

7. Choose OK on the Calendar Options property sheet.

Note: ECCO can display national holidays for many different countries. From the Calendar menu, choose Options, then the Holidays tab. Select a country from the drop-down list next to Show Holidays for. To display no holidays, choose None from the list.

Creating and Managing Appointments

An *appointment* is an item that has a time associated with it. While you can create items with time values in any ECCO view, the Calendar lets you schedule and manage your appointments at a glance. Display your Calendar by day, week, or month, in detail or in summary, and click in any day to add an appointment, or click any existing appointment to change it.

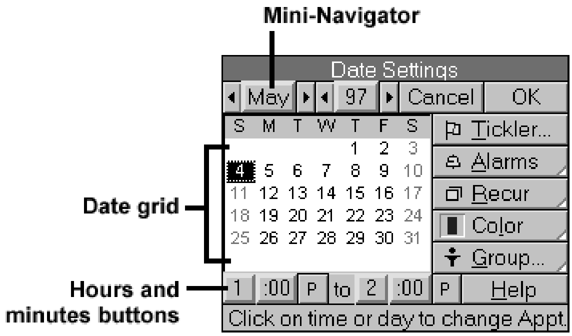
You can also schedule appointments by dragging any name or item from the PhoneBook or any Notepad into the Calendar. Outline notes for appointments can provide important additional information, such as meeting agenda items or directions to a location. Remind yourself of upcoming appointments with tickler items, or by setting alarms. If an appointment occurs regularly, you don't need to enter it over and over—just make it a recurring event.

The Date Settings Dialog Box

The Date Settings dialog box is a compact tool for changing the settings for a selected appointment. You can use it to change an appointment's date and times, add a tickler item for the appointment, set alarms, make the appointment a recurring event, and change the color of the appointment's Busybar block. When a tickler item, alarm, or recurring event is set for the appointment, a red triangle appears in the upper-left corner of the respective button.

You can open the Date Settings dialog box by:

- Clicking the time next to an existing appointment or the date next to a Tickler item.
- Selecting an appointment or item and choosing Time, Date, Alarm, etc. from the Calendar menu.



In summary displays of the Calendar, the Date Settings dialog box is not available; however, the Edit Appointment or Tickler item dialog box contains similar options. Select the appointment, right mouse click, and select Modify.

- **Mini-Navigator:** Moves the date grid forward or backward by month or year.
- **Cancel:** Cancels any changes made and closes the dialog box.
- **OK:** Enters any options selected and closes the dialog box.
- **Date grid:** Changes the date for the selected appointment. The appointment date appears in black, and the current date is shown in blue. If the appointment date is today's date, then it appears in red.
- **Tickler:** Sets tickler item options, such as beginning and ending dates.
- **Alarms:** Creates new custom alarms and edits existing ones.
- **Recur:** Makes the selected item recur at the time interval you specify.
- **Color:** Changes the color of the Busybar block for the selected appointment.
- **Group:** Displays the group scheduling menu from which you can choose to make a group meeting or keep the selected time available for other appointments or meetings. For more information, see the chapter or online help on "Group Scheduling."
- **Hours and minutes buttons:** Changes the beginning or end time of the selected appointment.
- **A or P button:** Toggles the selected appointment between AM and PM.
- **Help button:** Displays help information about the Date Settings dialog box.

Note: If you select an item not associated with a time (for example, in the Tickler section) and display the Date Settings dialog box , the Group, Hours, Minutes, A, P, and Help buttons are replaced by a Time button. Click the Time button to display the hidden buttons.

Scheduling Appointments

When you first open the Calendar, by default you see the detail display of the current day. Time slots appear at the left side of the Appointment section in one-hour increments. The simplest way to create an appointment is to select a time and type an appointment description. If a Busybar is visible, the appointment's Busybar block appears in it. To schedule an appointment on a date that is not displayed, move to the date you want, and then create the appointment; or schedule the appointment, and then change its date.

To schedule an appointment in day display

1. From the Calendar menu, choose Add Appt. Item, or either click to the right of the time at which you want the appointment to begin or use the UP ARROW and DOWN ARROW keys to select a time slot.
2. Type a description for the appointment.

To schedule an appointment in detail display of a week or month

1. From the Calendar menu, choose Add Appt. Item.
2. Type a description for the appointment.

Note: To change the default duration of ECCO appointment time slots (for example, to 30 minutes or two hours), choose the Options command from the Calendar menu and select the Appointments tab. Select a Default Appointment Duration from the list box.

To schedule an appointment in summary display of a week or month

1. From the Calendar menu, choose Add Appt. Item, or click a date and, from the pop-up menu, choose Add Appt. Item.

   The Add Appointment dialog box appears, displaying the selected date.

2. If appropriate, take any of the following actions:
   - Change the time or date of the appointment.
   - Create a tickler item reminder for the appointment.
   - Create an alarm for the appointment.
   - Make the appointment a recurring event.
   - Change the appointment's busybar block color.
3. Under Enter Appointment, type a description for the appointment.

4. Choose OK to return to the summary display, or choose the Jump to Notes button to add an outline note for the appointment and view the Calendar by day. Outline notes do not appear in summary displays.

Note: In any display of the Calendar, the Add Appt. Item command is also available from a pop-up menu when you click the right mouse button.

Scheduling Appointments Using the PhoneBook

You can schedule an appointment with anyone in your PhoneBook by viewing the PhoneBook and the Calendar side by side and dragging a name into the Calendar.

To schedule an appointment using the PhoneBook

1. From the Calendar menu, choose Use with PhoneBook.

   Or

   Choose the Calendar/PhoneBook button. The Calendar and PhoneBook appear side by side, in the PhoneBook window tab, and the Calendar is displayed by day. You can use the Navigator or the Week and Month buttons to move to another date, or use the Detail/Summary button to display the Calendar by week or day in summary.

2. In the PhoneBook list, point to the item bullet next to the name you want and hold down the left mouse button. The pointer changes to the item move icon.

3. Drag the name to the time slot or day of the Calendar on which you want to schedule the appointment. If the Calendar is displayed by day, the appointment is scheduled in the time slot you selected. In detail display of a week or month, the appointment is scheduled in the earliest available time slot. If the Calendar is displayed by week or month in summary, the Make Appointment or Tickler dialog box appears, containing options similar to the Add Appointment dialog box.

4. Take any actions you want, and then choose the OK button. The appointment is scheduled in the Calendar, and also appears as an outline note under the name in the PhoneBook. Any changes you make to the appointment are reflected in both places.

Scheduling Multi-Day Appointments

Create a multi-day appointment for any appointment or event that spans more than one day, such as a three-day seminar or a two-week vacation. Multi-day appointments appear in the Tickler section, and in solid red at the top of any Busybars. In summary displays, they appear on the dates you specify, preceded by a double asterisk.

To schedule a multi-day appointment

1. From the Calendar menu, choose Add Multi-Day Appt.

   ECCO displays the Add Multi-Day Appointment dialog box.

2. In the Beginning list box, select the date on which the appointment or event will begin.

3. In the Ending list box, select the date on which the appointment or event will end.

4. Type a description for the appointment in the Appointment Text box.

5. Deselect Keep time available for meetings to block out days for group scheduling.

6. Choose the OK button to return to the summary display or, if the Calendar is displayed in summary, choose the Jump to Notes button to add an outline note for the multi-day appointment, and view the Calendar by day. Outline notes do not appear in summary displays.

Note: In any display of the Calendar, the Add Multi-Day command is also available from a pop-up menu when you click the right mouse button.

Changing an Appointment

As your schedule changes, you will probably want to change the text or settings of an appointment.

- To change an appointment's description when the Calendar is displayed by day or in detail, just select the description and edit the text.
- To reschedule an appointment quickly, drag it to a new time or date. If the Calendar is displayed in summary, the Change Time? dialog box appears. Specify a new time, or keep the same time, and choose OK
- If a Busybar is displayed, you can also reschedule an appointment by clicking the middle of its Busybar block and dragging it to a new position in the Busybar.
- To change an appointment's duration quickly, drag either end of its Busybar block to make it longer or shorter. As you drag, ECCO displays the duration in 15-minute increments.
- If the Calendar is displayed by day or in detail, you can also select the appointment, press F2 to select new times or a new date. The date you enter need not be visible in the Calendar.
- Or, to change any of an appointment's settings, you can use the Date Settings dialog box or the Edit Appointment or Tickler dialog box.

To change any of an appointment's settings

1. If the Calendar is displayed by day or in detail, click the time to the left of the appointment, or select the item and choose Time, Date, Alarm, etc., from the Calendar menu, to open the Date Settings dialog box. However, if the Calendar is displayed in summary, click the appointment and, from the pop-up menu, choose Modify to open the Edit Appointment or Tickler dialog box.

2. Take one or more of the following actions:

- Select a new date in the date grid. The appointment's current date is bold and underlined and the date currently selected in the Calendar's Navigator is highlighted in black. To change the month or year, use the Mini-Navigator above the date grid.
- Change the appointment's beginning or end times, or both, using the hours and minutes buttons.
- Create a tickler item for the appointment.
- Create an alarm for the appointment.
- Make the appointment a recurring event.
- Change the color of the appointment's Busybar block. Choose the Color button and, from the pop-up menu, select a color.
- Create a group meeting.
- Edit the appointment's description (in the Edit Appointment or Tickler dialog box only).

3. Choose the OK button, or in the Edit Appointment or Tickler dialog box only, choose the Jump to Notes button to add an outline note for appointment, and view the Calendar by day. Outline notes do not appear in summary displays.

Deleting Appointments

ECCO preserves appointments indefinitely unless you delete or archive them. You can delete an appointment from the Calendar only, or delete all occurrences of the item in all ECCO views (for example, if you have dragged a name from the PhoneBook to the Calendar).

To delete an appointment

1. Select the appointment you want to delete.
    - If the Calendar is displayed by day, or by week or month in detail, from the Edit menu, choose Delete Items.
    - If the Calendar is displayed in summary, from the pop-up menu, choose Delete.
    - If the appointment appears only in the Calendar, it is deleted.
    - If the appointment appears in any other ECCO views, the Delete Items dialog box appears (if the Calendar is displayed by day or in detail), or the Delete Appointment or Tickler dialog box appears (if the Calendar is displayed in summary).
2. If a dialog box appears, take one of the following actions:
    - To delete the appointment from the Calendar only, select the Delete From Calendar and Date Folder option, or the Delete From Calendar Only option.

- To delete the appointment from all ECCO views, select the Delete entirely from file (all Views) option.

3. Choose the OK button.

Ticklers: To-Do's and What's Ahead

For many people, a simple list of calendar appointments isn't enough of a memory aid. You might also want to create a list of tasks to do each day. Or you might want to keep track of upcoming events so you can prepare for them. To-do's and reminders of upcoming appointments or events appear as tickler items in the Tickler section of the Calendar, when the Calendar is displayed by day or by week or month in detail.

The Tickler section can display the column pane. Use columns such as "Priority" or "Hot Issues" to prioritize your reminders efficiently. Tickler items in the Tickler section can be sorted by their text or column values, just like other items. For more information, see the chapter or online help on "Working with Items and Formatting." When the Calendar is displayed by week or month in summary, tickler items appear above each day's appointments.

You can create and view two types of tickler items:

- **Tickler items without specific times (to-do's):** Type reminders directly into the Tickler section, or add them to a date in a summary display. For example, put a shopping reminders or a phone call you want to make onto your daily to-do list without assigning a time to them.
- **Tickler items for appointments:** Create a tickler item for a scheduled appointment (with a specific time) to remind you of it in advance. For example, you could remind yourself to prepare a project report several days before the meeting at which you're scheduled to present it.

If you have a large number of tickler items or appointments, you might want to expand or collapse the folders in the Tickler section that contain tickler items by double-clicking the folder icons. You can also resize or rearrange the Tickler section and Appointment section or show or hide tickler items from summary displays. Just like appointments, tickler items can have outline notes.

Creating a To-Do List

On any day, you might want to create a list of to-do tasks that do not have specific times, such as calling a colleague or sending a birthday card. You can create tickler items for these tasks by entering them in the Tickler section or by adding them to any date displayed in summary.

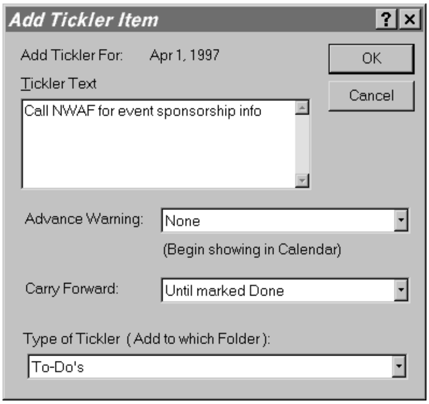
Note: Any item in the PhoneBook or in any Notepad can also appear in the Calendar as a tickler item. Select the item and, from the Tools menu, choose Ticklers.

To add a tickler item to the Tickler section

The Tickler section appears when the Calendar is displayed by day, or by week or month in detail. If necessary, move to the date on which you want to add the to-do item before you create it.

1. From the Calendar menu, choose Add Tickler, or click the Add button in the Tickler section.

   The Add Tickler Item dialog box appears, with the event date shown as the date selected in the Navigator.



2. In the Tickler Text list box, type a description for the tickler item.
3. In the Advance Warning list box, specify the number of days or weeks before the event you want to begin showing the item in the Tickler section.
4. In the Carry Forward box, specify the number of days or weeks after the event you want to show the item in the Tickler section. By default, the tickler item will appear until you mark it as done.
5. If you want, select a different folder in which to include the tickler item from the Type of Tickler list box. By default, the To-Do’s folder appears in the Tickler section. If you add a tickler item to a different folder, such as Birthday or Start Dates, that folder will appear in the Tickler section for as long as you specify that the item appears. If you select a different folder, the default beginning and ending settings may change.
6. Choose the OK button.

Note: In any display of the Calendar, the Add Tickler command is also available from a pop-up menu when you click the right mouse button.

To add a tickler item in summary display of a week or month

1. Select a date and, from the Calendar menu, choose Add Tickler, or click on the date and, from the pop-up menu, choose Add Tickler.

   The Add Tickler dialog box appears, with the event date shown as the date selected in the Navigator.

2. In the Enter Reminder or To-Do text box, type a description for the tickler item.

3. If you want, take one or more of the following actions:

   - Use the date grid or the Mini-Navigator to select a different event date.
   - Select a different folder in which to include the tickler item.
   - Choose the Tickler button to select beginning and ending settings for the item.
   - Choose the Alarms button to create an alarm for the tickler item.
   - Choose the Recur button to make the tickler item a recurring event.

4. Either choose the OK button to return to the summary display (the tickler item appears on the date you specified, preceded by the name of its folder), or choose the Jump to Notes button to add an outline note for the tickler item and view the Calendar by day. Outline notes do not appear in summary displays.

Note: To hide or show tickler items in summary displays, choose the Options command from the Calendar menu, then choose the Ticklers tab and select Week and/or Month under Show Ticklers in Summary Views for.

Creating Advance Warning for Your Appointments

Suppose you have an important meeting or presentation coming up. It’s not enough to have the event itself on your schedule; you might need reminders for a few days in advance so you can prepare for the event. Tickler items for appointments give you advance warning as many days ahead of time as you need.

Tickler items for appointments (that have specific times) appear by default in the Appointments folder in the Tickler section, when the Calendar is displayed by day, or by week or month in detail. Appointment ticklers do not appear in summary displays.

To create an appointment tickler item

The Calendar must be displayed by day, or by week or month in detail.

1. Click the time to the left of the appointment, or select the item and, from the Calendar menu, choose Time, Date, Alarm, etc.

   The Date Settings dialog box appears.

2. Choose the Tickler button.

   The Item’s Calendar Tickler Options dialog box appears.

3. Select the Show in Tickler Section option.

4. If you want, specify how many days or weeks before the event you want to begin showing the item in the Tickler section and when to end showing the item. By default, the item will appear for the day of the event. Selecting Until Marked Done from the Carry Forward list box will keep the item in the Tickler until you mark it as done.

5. Choose OK, and then choose the OK button in the Date Settings dialog box.

Note: Appointment tickler items do not appear in the Tickler section when the day of the appointment is selected in the Navigator and the Calendar is displayed by day; however, they do appear in the Tickler section when the Calendar is displayed by week or month, in detail.

Changing a Tickler Item

As your schedule changes, you will probably want to change the text or settings of a tickler item. To change the description of a tickler item when the Calendar is displayed by day or in detail, simply select the description and edit the text.

To change any settings for a tickler item

1. If the Calendar is displayed by day or in detail, click the date to the left of the tickler item, or select the item and choose Time, Date, Alarm, etc., from the Calendar menu, to open the Date Settings dialog box. However, if the Calendar is displayed in summary, click the tickler item and, from the pop-up menu, choose Modify to open the Edit Appointment or Tickler dialog box.

2. Make the desired changes to the tickler item’s settings or description. To change the tickler item’s beginning and ending settings or its folder, choose the Tickler button to display the Item’s Calendar Tickler Options dialog box.

3. Either choose the OK button, or in the Edit Appointment or Tickler dialog box only, choose the Jump to Notes button to add an outline note for appointment, and view the Calendar by day. Outline notes do not appear in summary displays.

Marking Tickler Items as Done

Sometimes you need to be reminded of a task until you get around to doing it. When you create any tickler item, you can specify that it will be shown in the Calendar until you mark it as done. When you mark a tickler item as done, ECCO assigns it the current date as the Done date. ECCO removes the tickler item from the Tickler section; however, the item is not deleted from the file. The tickler item remains in any other folder or view to which you may have added it. For example, if you created the tickler item in the PhoneBook or in a Notepad, it will still appear there after it is marked as done.

Marking items as done helps you keep track of what you have accomplished and lets you use the item again in the future. You can mark as done not only any tickler item but any item or outline note in any ECCO view. By default, if your ECCO file was created using any of the ECCO templates:

- All items you have marked as done appear in the Completed Work notepad in the Done folder.
- The Done column appears in the column pane of the Calendar and in all Notepads.

You can also use the Folder window to add the Done folder (or insert the Done column) in any ECCO view. For more information about folders and columns, see the chapter or online help on “Folders” and “Columns and Values.”

To mark an item as done

If the Calendar is the active view, it must be displayed by day or in detail. If you want to display the column pane, choose the Show Columns command from the Column menu.

1. Select the item.
2. From the Item menu, choose Mark as Done or, in the column pane, click the item’s cell in the Done column. The item is marked as done on today’s date. When you select the item, a checkmark appears next to the Mark as Done command on the Item menu.

Note: To change an item’s Done date, in any ECCO view, click its cell in the Done column and edit the date in the appointment edit box.

To remove a tickler item from the Calendar by changing its settings

1. If the Calendar is displayed by day or in detail, click the date to the left of the tickler item, or select the item and choose Time, Date, Alarm, etc., from the Calendar menu, to open the Date Settings dialog box. However, if the Calendar is displayed in summary, click the tickler item and, from the pop-up menu, choose Modify to open the Edit Appointment or Tickler dialog box.
2. Choose the Tickler button.

   The Item’s Calendar Tickler Options dialog box appears.
3. Select the Don’t Show option.
4. Choose the OK button, and then choose the OK button in the Date Settings dialog box or the Edit Appointment or Tickler dialog box.

Using Alarms

Alarms are reminders that occur at a specified time. They either appear as a message on your computer screen, play a sound, or launch a file. Alarms can occur at the time of an event (such as a meeting), or minutes, hours, days, even weeks before or afterwards. Attach alarms to any item or appointment, or create them without attaching them to an item in any ECCO view.

ECCO has two types of alarms:

- A *simple alarm* goes off once, at the time you specify, and displays a text message.
- A *custom alarm* can go off at the time of the event and at multiple times before and after the event. It can display a message, play a sound, or launch a document, application, or batch file. For example, you could set a custom alarm to launch your presentation program every morning for a week before the presentation is due, and set follow-up alarms after the event to remind you to finish a follow-up report or mark an item as done. You can also rename a custom alarm, add it to the Alarms menu, and use it repeatedly.

When you set an alarm for a tickler item in the Tickler section of the Calendar, an alarm icon appears to the right of the item's text, in the status area. If ECCO is running when the alarm is scheduled to occur, ECCO displays the alarm message, plays the sound, or launches the application, even if you are currently working in another application. If ECCO is not running when an alarm is scheduled to occur, the Alarms Occurred dialog box appears when you restart ECCO. When any alarm occurs, you can make it occur again later by specifying the next alarm time for the event.

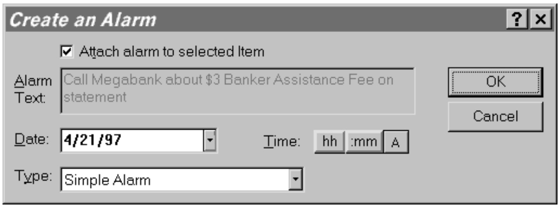
Setting Simple Alarms in the PhoneBook or a Notepad

A simple alarm can display the text of the selected item (including appointments and tickler items). You can also set a simple alarm that is not associated with any item, but displays a message of your choice. For example, if you need to remind yourself to pick up your dry cleaning on your way home, you can set an alarm and type a reminder message for that task.

To set a simple alarm

1. If you want the alarm to display the text of an item, select the item.
2. From the Tools menu, choose Alarms, and then choose Create New Alarm.

   ECCO displays the Create An Alarm dialog box.



3. In the Date list box, select a date.

4. To set a time for the alarm, use the Hours and Minutes buttons. If you do not set a time, the alarm will occur at the start of the day of the event. You can specify the start of your day using the Calendar Options command on the Calendar menu.

5. If you want the alarm to display the text of the item you selected, either select the Attach Alarm To Selected Item option or, in the Alarm Text box, type the message you want the alarm to display and make sure that the Attach Alarm To Selected Item option is not checked.

6. In the Type list box, select Simple Alarm if it is not already selected.

7. Choose the OK button.

   When the alarm occurs, ECCO displays a dialog box with the message or item text you specified.

Note: You can also set alarms from the Date Settings dialog box or, when the Calendar is displayed in summary, from any of the dialog boxes you use to create or modify appointments or tickler items.

Setting Custom Alarms in the PhoneBook or a Notepad

You can set custom multiple alarms for any event and before and after the event. You can also rename any custom alarm and use it again later.

Note: Named alarms that you create in your shared files are also available to anyone who has the proper access privileges for your ECCO view.

To set a custom alarm

1. If you want the alarm to display the text of an item, select the item.

2. From the Tools menu, choose Alarms, and then choose Create New Alarm.

   ECCO displays the Create an Alarm dialog box.

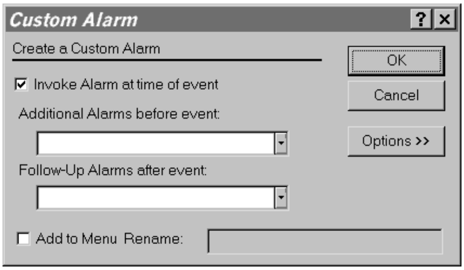
3. In the Date list box, select a date.

4. To set a time for the alarm, use the Hours and Minutes buttons. If you do not set a time, the alarm will occur at the start of the day of the event. You can specify the start of your day using the Calendar Options property sheet by selecting Options from the Tools menu, then choosing the Appointments tab.

5. If you want the alarm to display the text of the item you selected, either select the Attach Alarm to Selected Item option or, in the Alarm Text box, type the text you want the alarm to display and make sure that the Attach Alarm to Selected Item option is not checked.

6. In the Type list box, select Custom.

   ECCO displays Custom Alarm dialog box.



7. Take one or more of the following actions:

   - Select the Invoke Alarm at Time of Event option if you want the alarm to go off at the time of the event.
   - If you want, choose additional alarms before and after the event by clicking or dragging in the drop-down number menu. Selecting multiple numbers will cause alarms to occur at multiple times before or after the event. You can select any number of minutes, hours, days, or weeks (up to six weeks).
   - To reuse the same alarm settings in the future, select the Add to Menu option, and then type in the Rename box a new name for your alarm.
   - Your named alarm will appear in the Type list in the Create an Alarm dialog box, as well as at the bottom of the Alarms menu (displayed from the Date Settings dialog box or the Edit Appointment or Tickler dialog box).
   - To specify other alarm actions, choose the Options button.

8. Choose the OK button, and then choose the OK button in the Create an Alarm dialog box.

Note: You can also set alarms from the Date Settings dialog box or, when the Calendar is displayed in summary, from any of the dialog boxes you use to create or modify appointments or tickler items.

Specifying Alarm Actions

In addition to displaying a message with the text of the item, custom alarms can also:

- Play any sound (.WAV file) in your computer.
- Display any dialog message you type.
- Launch files, programs, or batch files. For example, an alarm can launch your word-processing program to remind you that you need to send a memo to your staff, or launch a batch file that backs up your files at a certain time every day.

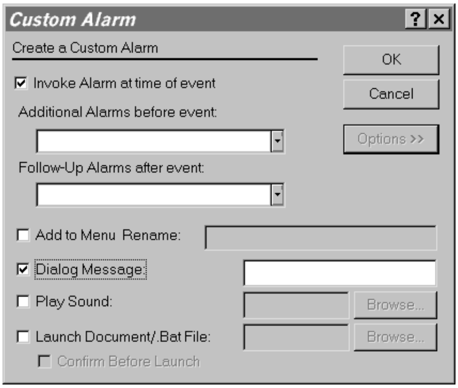
To specify alarm actions

1. From the Tools menu, choose Alarms, and then choose Create New Alarm. In the Type box, select Custom.

   The Custom Alarm dialog box appears.

2. Choose the Options button.

   The dialog box expands, displaying options for setting alarm actions.



3. Take one or more of the following actions:
   - To display a custom message instead of the item's text, select the Dialog Message option and then type your message.
   - To play a sound, either select the Play Sound option, and then choose the Browse button to search for the .WAV file you want, or type the path, including the filename, of the sound you want to play.
   - To launch a document or a batch file, either select the Launch Document/.BAT File option, and then choose the Browse button to search for the file you want, or type the path, including the filename, of the file you want to launch.
   - To display a dialog box that lets you confirm before launching, select the Confirm Before Launch option.
4. Choose the OK button.

Note: You can also set alarms and specify their actions from the Date Settings dialog box or, when the Calendar is displayed in summary, from any of the dialog boxes you use to create or modify appointments or tickler items.

Before ECCO can launch a document file, you must use Windows Explorer or File Manager to associate its file extension with a program. For more information, see the chapter or online help on "Using ECCO with Other Programs."

Setting Alarms in the Calendar

In the Calendar, you can use the Date Settings dialog box to set simple or custom alarms quickly for any existing appointment or tickler item.

To set alarms in the Calendar

1. If the Calendar is displayed by day or in detail, click the time to the left of the appointment or tickler item, or select the item and choose Time, Date, Alarm, etc., from the Calendar menu, to open the Date Settings dialog box. However, if the Calendar is displayed in summary, click the appointment or tickler item and, from the pop-up menu, choose Modify to open the Edit Appointment or Tickler dialog box.

2. Choose the Alarms button to display the Alarms menu.

3. Take one or more of the following actions:

   - To create a custom alarm, choose Custom, and specify the event times and, optionally, alarm actions.
   - To set a simple alarm that will occur only at the event time and will display the text of the appointment or tickler item, choose Simple Alarm. If you selected a tickler item, the alarm will occur at the start of the day of the event. You can specify the start of your day using the Calendar Options command.
   - To set a previously-named alarm, select it from the Alarms menu.
   - To cancel existing alarms for the selected item, choose None.

4. Choose the OK button in the Date Settings dialog box or the Edit Appointment or Tickler dialog box or, in the Edit Appointment or Tickler dialog box only, choose the Jump to Notes button to add an outline note for appointment or tickler item, and view the Calendar by day. Outline notes do not appear in summary displays.

Note: When the Calendar is displayed in summary, you can also set alarms from any of the dialog boxes you use to create appointments or tickler items.

Canceling an Alarm

When you no longer need an alarm, you can:

- Cancel the alarm in the Calendar by opening either the Date Settings dialog box, the Edit Appointment, or the Tickler dialog box, choosing the Alarms button, and by then choosing None.
- Delete the item with which the alarm is associated.
- Delete the alarm from the Review Alarms dialog box, from the Manage Named Alarms dialog box, from the PhoneBook, or from a Notepad.

Reviewing Alarms

To see all alarms you have set in all ECCO views, or to delete an alarm you no longer need, use the Review Alarms command in any ECCO view.

To review alarms

1. From the Tools menu, choose Alarms, and then choose Review Alarms. The Review Alarms dialog box appears, displaying all alarms set for the current week.
2. Take one or more of the following actions:
   - To see alarms occurring in a week other than the current week, choose the down arrow next to Alarms Occurring The Week Of and select a different date.
   - To delete an alarm, select the alarm you want to delete and then choose the Delete button.
3. When you are finished, choose the OK button.

Managing Named Alarms

Named alarms are custom alarms that you have created, named, and added to the Alarms menu (displayed from the Alarms button in the Date Settings dialog box or the Edit Appointment or Tickler dialog box). Named alarms also appear in the Type list in the Create An Alarm dialog list box. If your ECCO file was created from a template, it may contain additional default named alarms, such as 5 Minutes Before, 30 Minutes Before, etc. ECCO lets you edit or rename existing named alarms, delete named alarms, or reorder named alarms on the Alarms menu.

To manage named alarms

You can manage named alarms in any ECCO view.

1. From the Tools menu, choose Alarms, and then choose Manage Named Alarms. The Manage Names Alarms dialog appears.
2. Take one or more of the following actions:
   - To rename an alarm, select the alarm you want to rename, and then type in the Rename box the new name you want to give the alarm.
   - To create a new named alarm, choose the New button.

- To edit a named alarm, select the alarm you want to edit, and then choose the Edit button.
- To delete a named alarm, select the alarm you want to delete, and then choose the Delete button.
- To reorder named alarms on the Alarms menu, select the alarm you want to move, and then choose either the Up or Dn reorder button. The New Named Alarm dialog box and the Edit Named Alarm dialog box are similar to the Custom Alarm dialog box.

3. When you are finished, choose the OK button.

Using Recurring Events

Recurring events are activities that happen at regular intervals—events such as weekly appointments or bimonthly conference calls. When you specify an event as recurring, ECCO automatically displays the event at the dates and times of your choice in your Calendar.

By using recurring events, you can:

- Save time.
- Be certain that you'll remember events that happen regularly.
- Avoid scheduling conflicts. If you schedule another appointment that coincides with the recurring event, a red-and-white striped pattern in the Busybar block alerts you to the conflict. Or, if you schedule a recurring event that conflicts with holidays or weekends, ECCO displays a dialog box listing the conflicts.

You can create events recurring as frequently as every day or as far apart as every 20 years. For example:

- Weekly status reports (due the same day every week)
- Payroll (1^{st} and 15^{th} of every month)
- Board meetings (first Tuesday of every month)
- Estimated taxes (four times a year)
- Annual reports (yearly)

Creating Recurring Events

ECCO offers you two types of recurring events:

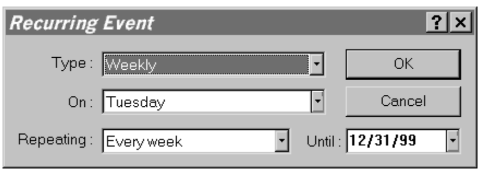
- **Standard recurring events** are based on the current date selected in the Calendar's Navigator. For example, if the current date is Friday, September 5, 1997, ECCO gives you the following choices: every day, every Mon thru Fri, every Friday, the 5^{th} of every month, the first Friday of every month, and every September 5^{th}.
- **Custom recurring events** can be set for almost any time period, such as the 11^{th}, 12^{th}, and 13^{th} of each month.

Once you've created a recurring event, a recurring event icon appears in the status area to the right of the item with which it's associated, in the Calendar's Tickler section or Appointment section.

Note: When a date column is visible in any ECCO view, you can also make an item a recurring event by clicking its cell in the column and selecting the down arrow in the appointment edit box to open the Date Settings dialog box.

To create a recurring event

1. If the Calendar is displayed by day or in detail, click the time to the left of the appointment or tickler item, or select the item and choose Time, Date, Alarm, etc., from the Calendar menu, to open the Date Settings dialog box. However, if the Calendar is displayed in summary, click the appointment or tickler item and, from the pop-up menu, choose Modify to open the Edit Appointment or Tickler dialog box.
2. Choose the Recur button to display the Recur menu. The commands on this menu change depending on the date selected in the Calendar's Navigator.
3. To create a standard recurring event, choose an interval of recurrence from the Recur menu.
4. To change an existing selected recurring event so that it does not recur, choose Non-Recurring.
5. To create a custom recurring event, choose Custom, and take one or more of the following actions in the Recurring Event dialog box before choosing the OK button:



   - In the Type list box, select the time increment you want for the recurring event (daily, weekly, monthly, or yearly).
   - In the On list box, select as many options as you want.
   - In the Repeating list box, select the frequency with which you want the event to recur. For example, if you selected Weekly in the Type list box, you could choose the Every 2 Weeks option in the Repeating list box to have the recurring event scheduled at two-week intervals. If you selected the Monthly option in the

Type list box, a Specific Months option is available. This option lets you select multiple months, such as January, April, July, and September.

- In the Until list box, select the date on which you want the event to stop recurring.

6. Choose the OK button in the Date Settings box or the Edit Appointment or Tickler dialog box or, in the Edit Appointment or Tickler dialog box only, choose the Jump to Notes button to add an outline note for the recurring event and to view the Calendar by day. Outline notes do not appear in summary displays.

Note: ECCO lets you combine recurring events with alarms in powerful ways. For example, to help yourself reduce eye and muscle strain from sitting too long at your computer, make a tickler item that recurs every weekday, and has a custom alarm with an "ergonomic" dialog message such as "Get up and stretch now." Set an event time for the alarm an hour after your day begins, and follow-up alarms every hour for the next six hours (or at any times you specify). If you choose not to show the item in the Tickler section, you won't clutter your Calendar with the recurrences, and ECCO will still remind you to stretch several times every day.

Changing Recurring Events

You can change a recurring event by changing its recurrence options or by changing its other options in the same way that you change any appointment.

If you change the time or duration of a recurring event by using the Date Settings dialog box, the Edit Appointment dialog box, or the Tickler dialog box, the Change Recurring Event dialog box appears. You can change the time of:

- All recurrences
- The selected recurrence
- Future recurrences

For example, if your weekly staff meeting changed from 10 a.m. to 11 a.m. for one week only, you would change the selected recurrence only (which is the default option). However, if the meeting permanently changed to 11 a.m., you would change future occurrences only. The Calendar would still reflect all past occurrences at the time they occurred.

If you change a recurring event's time or duration by dragging the Busybar block or its ends or by dragging the appointment item to a new time slot, ECCO changes the selected occurrence only.

To change the date of the selected occurrence only, select another date with the date grid or Mini-Navigator in the Date Settings dialog box or Edit Appointment or Tickler dialog box.

To change the date for all occurrences, or to change the event so it does not recur, use the Recur menu to select another recurrence interval or select Non-Recurring.

Any changes to the recurring event's description, Tickler options, alarms, or Busybar block color are reflected in all occurrences of the event.

You can create different outline notes for each occurrence of a recurring event. For example, a weekly class can have unique lecture notes for each week. To see all notes for all occurrences of a selected recurring event, from the Calendar menu, choose See All Recurring Notes. Choose the command again (so that its name is unchecked on the menu) to see only the notes for the selected occurrence.

Canceling Recurring Events

You can cancel a recurring event in three ways:

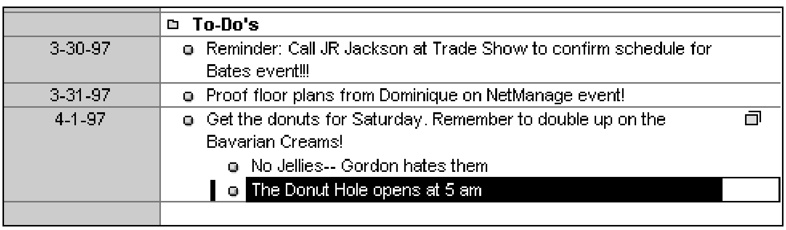
- Delete the item with which a recurring event is associated. In the dialog box that appears, select to delete the selected recurrence(s) only, future recurrences only, all recurrences, or delete the item entirely from the file in all views (if the item appears in more than one ECCO view). You delete a recurring event in the same way that you delete any appointment.
- Specify an earlier expiration date for the event in the Recurring Event dialog box.
- Cancel the recurring event without deleting the item by changing the event to non-recurring.

Adding Outline Notes

For some appointments or tickler item reminders, you might want to include additional background information, directions to a location, or a list of points to be discussed at a meeting. With ECCO, you can include a detailed outline as part of the description of any item. For more information, see the chapter or online help on "The Notepad and Outlining."

If your appointment or tickler item is a recurring event, your outline notes can be displayed for every occurrence or be specific to one occurrence. For example, you can set up a recurring event for a weekly staff meeting and use outline notes to write new agenda notes each week.

Use outline notes to describe an appointment or item



Note: Outline notes do not appear in summary displays of the Calendar.

To make your outline notes distinctive, you can apply outline styles, outline labels, or other formatting. For more information, see the chapter or online help on "Working with Items and Formatting."

To add an outline note in day display, or in detail display of a week or month

1. Select the appointment or tickler item.

2. From the Calendar menu, choose Add Outline Note. ECCO inserts an outline note or subitem to the right of the appointment or tickler item.

3. Type descriptive information in the outline note. Each time you press Enter another subitem is added at the same heading level.

Note: In day or detail display, you can also add outline notes by pressing CTRL+R. Or, when an appointment is selected, you can simply press ENTER.

To add an outline note from summary display of a week or month

1. Click an existing appointment or tickler item and, from the pop-up menu, choose Modify.

   The Edit Appointment or Tickler dialog box appears.

2. Choose the Jump to Notes button.

   ECCO displays the Calendar by day, for the selected date, and adds an outline note to the selected appointment or tickler item.

3. Type descriptive information in the outline note.

Note: You can also create outline notes while you create appointments or tickler items in summary displays by using the Jump to Notes button in the respective dialog boxes.

To display or hide all outline notes for a recurring event

The Calendar must be displayed by day, or by week or month in detail.

1. Select the recurring appointment or tickler item.

2. From the Calendar menu, choose See All Recurring Notes.

   While this command is chosen and while its name is checked on the menu, ECCO displays all outline notes from all occurrences of the selected recurring event. When the command is not chosen, ECCO displays only the outline notes for the selected occurrence.

Using Columns in the Calendar

When the Calendar is displayed by day, or by week or month in detail, you can display the column pane in the Tickler and Appointment sections by choosing the Show Columns command on the Column menu. To close the column pane, choose the Show Columns command again.

By default, most ECCO files created from a template contain:

- The Priority, Hot Issues, and Done columns in the Tickler section
- The Done folder in the Completed Work notepad

Organize your tasks more efficiently by assigning priority to your tickler items. The Priority column is a pop-up list column; use its default values (Low, Medium, and High) or add your own values.

To add a new value to a pop-up list column

1. Click a cell in the pop-up list column, or select a cell and press ENTER.
2. Choose <Edit Values> from the pop-up list.

   The Pop-up List Column Values dialog box appears.
3. Choose the New Pop-Up Value button.
4. Type over Value 1 as it appears in the Edit Pop-up Value box.
5. Choose the OK button.

   The new value appears in the column's pop-up list.

To sort items by their column value, go to the column, click the right mouse button, and choose the Sort, Sort Up, or Sort Down command. For more information, see the chapter or online help on "Working with Items and Formatting."

Using the Done column to mark items as done also adds them to Done folder in the Completed Work notepad. Similarly, if a folder appears in one view and also appears as a column in another view, any value you give it will appear in both locations.

For example, if your file contains the Hot Issues folder in a Hot Issues notepad, when you check the Hot Issues column for a tickler item in the Calendar, the item also appears in the Hot Issues notepad. If you assign a date value to any item in the PhoneBook or any Notepad using any date column or folder, ECCO displays the item in the Calendar as well as in the original view.

When the Tickler section is displayed beside the Appointment section (rather than above it), you can display a different column pane for each section.

You can also:

- Add other columns to a column pane. For more information, see the chapter or online help on “Columns and Values.”
- Add the Appointments folder or To-Do folder as a folder column to the PhoneBook or to any Notepad. For more information, see the chapter or online help on “Folders.”
- Use filters to see only the appointments or ticklers that have specific column values. For more information, see the chapter or online help on “Other ECCO Features.”
- Use a form to add an appointment or tickler item and to specify multiple column values at once. For more information, see the chapter or online help on “Forms.”

Printing Your Schedule

ECCO gives you a variety of options for printing your Calendar. You can print:

- A specified day, week, month, or range of dates
- All items, or only selected items and their subitems
- Appointments, tickler items, or both
- Detail or summary displays
- Outline notes
- Columns

You can also use special calendar formats and page sizes, such as Day Timer™. When you select a set of print options, you can save them as a print catalog to reuse them without having to specify them all again. For more information, see the chapter or online help on “Printing.”

Working with Related Dates

Related dates help you track appointments and ticklers that relate to the same project or activity. They are a group of items in the Calendar whose dates can change depending on the outcome of some other date. These dates can have a single *anchor date* or be linked to each other in a *chain*.

Anchor Dates

Suppose an attorney has a court date on Monday, April 28. Almost every task for this case is related to the actual court date. If the court date changes, it is essential that all tasks related to the court date change with it. The court date is the *anchor date* because all other tasks are dependent on it.

Chained Dates

Consider a construction project. The masons must pour the foundation to allow the framers to build the house, which will allow the roofers to build the roof, so that the painters can paint, and so on.

If the framers are a week late building the house, the roofers' schedule will get pushed out a week, which in turn will push out the painters' schedule a week. Dates such as these, in which each is dependent on the date item that precedes it, are called *chained dates*.

Creating Related Dates

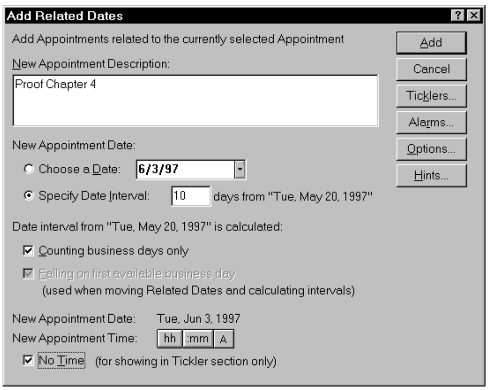
There are two ways to create related dates:

- You can base a group of dates on a single anchor date. If you change the anchor date, all dates change in relation to it.
- You can link dates in a chain. If you change one date, all related dates following it change.

To create related dates based on an anchor date

1. In the Calendar, select the date item that you want to use as the anchor date.
2. From the Calendar menu, choose Add Related Dates.

   ECCO displays the Add Related Dates dialog box.



3. Choose the Options button.

   The Related Date Options dialog box appears.

4. Choose Single Anchor Date to make the currently selected appointment item the anchor date. Single Anchor Date is the default.
5. Choose OK.
6. In the New Appointment Date section, do one of the following:

- Enter a date before or after the anchor date.
- Use the Date Interval field to quickly navigate *x* number of days in the future or past. To navigate thirty days before the anchor date, type **-30**.

Note: Entering a value in either of these fields automatically updates the other. For example, if you enter a date in the Choose a Date field, the Specify Date Interval field automatically displays the number of days to the anchor date.

7. In the Date Interval Calculation section, specify how the date interval is calculated:
   - **Counting business days only:** Subtracts weekends from the total number of days from the anchor date.
   - **Falling on first available business day**: Calculates the interval based on the first available business day.
8. In the New Appointment Time section, change the appointment time or check No Time to display the item in the Calendar Tickler section.
9. Choose the Add button.
10. Repeat the process for all new dates related to the anchor date.

To create related dates that are chained

1. In the Calendar, select a date item.
2. From the Calendar menu, choose Add Related Dates.

   ECCO displays the Add Related Dates dialog box.
3. Choose the Options button.

   The Related Date Options dialog box appears.
4. Choose No Anchor Date, and then choose OK.
5. In the New Appointment Description box, enter the text for the new appointment.
6. In the New Appointment Date section, do one of the following:
   - Enter a date before or after the previously entered related date.
   - Use the Date Interval field to quickly navigate *x* number of days in the future or past. To navigate thirty days before the previously entered date, type **-30**.
7. In the New Appointment Time section, change the appointment time or check No Time to display the item in the Calendar Tickler section.
8. Choose the Add button.
9. Repeat the process for all new dates related to this group.

Note: You can select any of these related dates and add additional dates to the group.

Viewing Groups of Related Dates

By viewing all of your related appointments, you can deal with all dates in the group at one time, print a report of those appointments, and make any changes and updates.

To show related dates

1. Select a date from the group of related dates you want to view.

2. From the Calendar menu, select Show Related Dates.

   The dates will be displayed in the Search Results notepad.

Note: You cannot view related dates when Calendar is displayed by year.

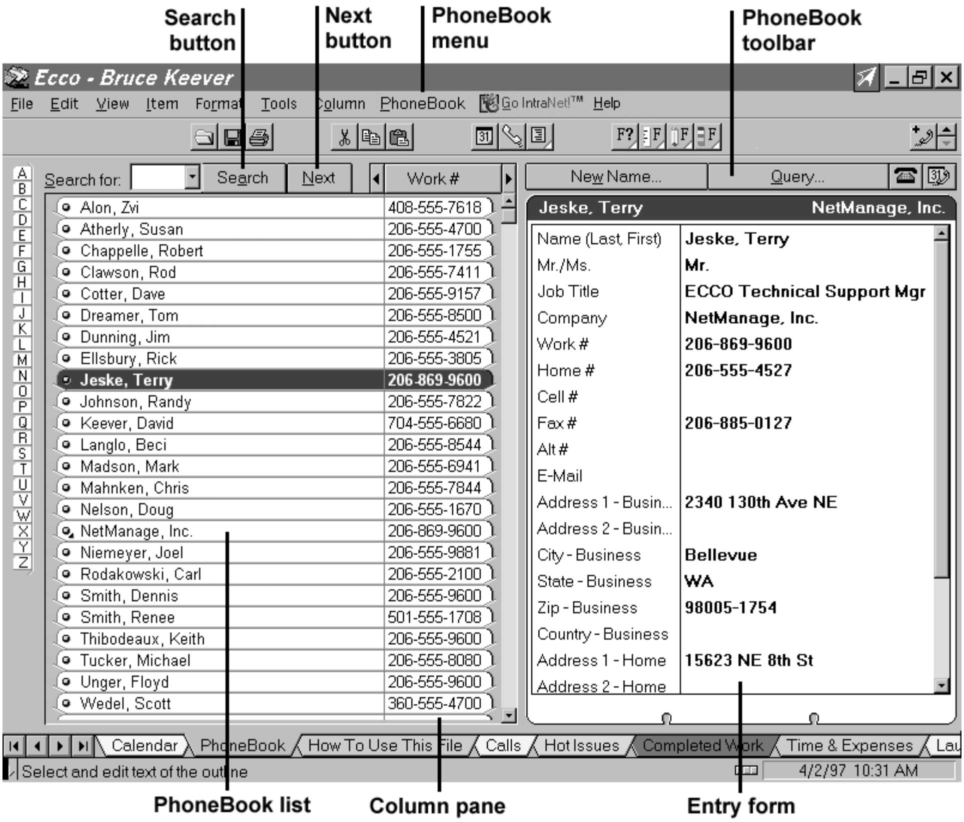
Modifying Related Dates

Once you have created a set of related dates, they can be modified like any other date. If the date you want to modify is the group's anchor date, or if you have created related dates without an anchor, ECCO displays the following options:

- **Adjust all dates on or after today's date:** Adjusts all the dates that fall on today's date or later.
- **Adjust all dates on or after the currently selected calendar date:** Moves all related appointments that occur after the current appointment's date and time.
- **Don't adjust any other dates in the group:** Modifies only the selected date.

Chapter 4. The PhoneBook

To display the PhoneBook, choose PhoneBook from the View menu, or choose the PhoneBook tab.



- **PhoneBook toolbar:** Using the PhoneBook toolbar buttons, you can perform the same functions that you can using the PhoneBook menu, such as search for and collect PhoneBook entries, find the next instance of specified search text, query the PhoneBook by form, dial and log phone calls, and make an appointment in your calendar.

- **PhoneBook menu:** The PhoneBook menu commands let you perform basic PhoneBook actions, such as entering new and editing existing PhoneBook entries.

- **PhoneBook list:** The PhoneBook list displays PhoneBook items. When you enter a name in the PhoneBook, ECCO converts it into an item. Each item has an item bullet to its left.
- **Entry form:** You enter names, numbers, addresses, and other information into the fields in the entry form. You also use this form to view or make changes to existing entries. The PhoneBook entry form is customizable.
- **Column pane:** The column pane provides an alternate display of the information, other than the name, that you entered using the entry form.
- **Search button:** Search for any text in the PhoneBook (names, outline notes, companies, or any field information) by typing text in the Search For field and then choosing the Search button. Choose the Search button with the search edit box empty to collect all names in the PhoneBook.
- **Next button:** Choose this button to highlight the next instance of the search text in the displayed PhoneBook items. You need to enter text in the Search For field for this function to work correctly.

Introduction to the PhoneBook

You can use the PhoneBook to record names, numbers, and addresses in your ECCO files just as you would in any address book. However, the ECCO PhoneBook offers you much more than a paper address book does.

In the PhoneBook you can:

- **Enter information into the PhoneBook** using the straightforward, customizable entry form.
- **Add outline notes** using the ECCO outlining features. Enter any number of outline notes for each name in the PhoneBook.
- **Search for an entry** that matches a specified single character, multiple characters, a word, or a phrase. You can search for a person's name, a company's name, outline notes, or any other information you enter in the PhoneBook form.
- **Create and track any number of Calendar appointments** for any name in your PhoneBook.
- **Dial any number** saved in the PhoneBook. Let ECCO search for it and do the dialing for you.
- **Automatically log the time, date, and duration** of every call you make.
- **Import from another software program** the file that you currently use as your on-line phone or address book. You can import any file that can be saved as a CSV (comma-separated value) or as a tab-separated text file.
- **Organize names** in the PhoneBook by collecting them in ECCO folders.
- **Display columns of custom information** about the names in the PhoneBook.

- **Apply filters** to the PhoneBook to display only those names that meet search criteria, based on any field or column.
- **Customize the PhoneBook entry form** to display only those fields into which you customarily enter information.

Introduction to Entering Information

To enter and update PhoneBook information, you use an entry form similar to a paper form. To enter new information, simply fill in the blanks. You can use the entry form to:

- Add new entries
- Edit or update existing entries

When you add information to the PhoneBook, the name (or item) is displayed in the PhoneBook list, and the rest of the information is displayed in the column pane. The name plus its associated information (address, phone number, and so on) is called an *entry*.

Adding New PhoneBook Entries

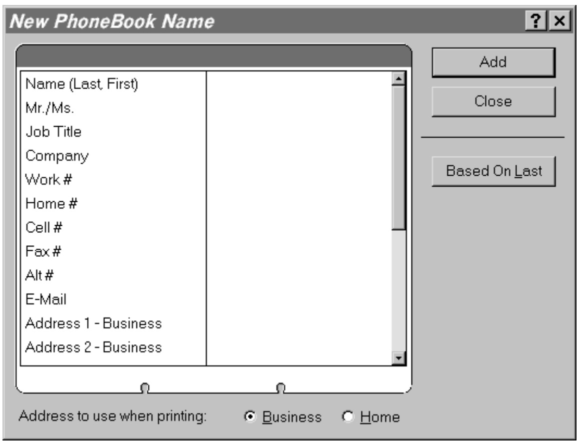
Use the New PhoneBook Name dialog box to add new entries to the PhoneBook.

To add a new entry

1. From the PhoneBook menu, choose New Name.

   Or

   Choose the New Name button on the toolbar. The New PhoneBook Name form appears.



2. In the Name field, type the name you want to add, last name first.

3. Press the TAB key to move to the next field.
4. Type information in all applicable fields.
5. To indicate which address you'd like ECCO to use when printing, select either Business or Home next to Address to use when printing.
6. When you have finished filling in the fields, choose the Add button.
7. To add another entry to the PhoneBook, repeat steps 2 through 6.
8. When you have finished adding entries to the PhoneBook, choose the Close button.

   The name (or item) is displayed in the PhoneBook list, and the name plus the remainder of the information is displayed in the entry form. You can use the entry form to edit or add information to the entry.

You can display the column pane and add more columns to the PhoneBook. Use columns to display additional information about your PhoneBook entries or use them to filter the entries displayed in the view.

Editing Entries

Use the PhoneBook entry form to edit PhoneBook information.

To edit an existing entry

1. In the PhoneBook list, select a name. All information associated with the name appears in the form.
2. If the entry form is not displayed, from the PhoneBook menu, deselect Hide Form or press CTRL+ALT+H.
3. Type new information as desired. Press the TAB key or SHIFT+TAB to move forward or backward through the fields. The entry is modified to include your changes.

Adding Outline Notes to an Entry

For some entries, a name, an address, and a phone number might be adequate. With ECCO, you can also include a detailed outline as part of the description of any entry. Your outline could include any or all of the following:

- A log of all conversations.
- A log of all appointments and outline notes for those appointments.
- Additional information about the person or company, such as directions to a home or business or a list of topics to discuss the next time you talk on the phone.
- Any letters or faxes sent using the Correspondence Manager.

To add outline notes to an entry

1. Select the entry to which you want to add outline notes.
2. Press the ENTER key.

   Or

   From the PhoneBook menu, choose Add Outline Note. ECCO inserts a blank line for a subitem below and to the right of the entry item.
3. Type information in the subitem line. Each time you press ENTER, an additional blank line and subitem is added at the same heading level.
4. To move an item up or down in the outline or to promote or demote an item in the outline, drag the item bullet (located at the left of the item) to the desired location.

   Or

   Select the item and then press ALT+LEFT ARROW or ALT+RIGHT ARROW.
5. You can expand or hide the outline levels by double-clicking the item bullet.

Deleting Entries

To delete a PhoneBook entry, you select the entry's item bullet and then delete it. The associated information is deleted along with it.

To delete an entry

1. Select the item you want to delete.
2. From the PhoneBook menu, choose Delete Name.

   Or

   Press CTRL+D.

Creating Custom PhoneBook Entry Forms

In addition to using the standard PhoneBook entry form, you can also create custom PhoneBook forms to accommodate your special needs.

To create a custom PhoneBook entry form

1. From the PhoneBook menu, choose Change PhoneBook Form, and then choose New. The Create Phone Form dialog box appears.
2. In the Rename box, type a name for your custom PhoneBook entry form. This name will appear in the Change PhoneBook Form submenu.

3. In the Choose Fields list, select all the fields you want to add to your form. To select multiple fields, hold down the CTRL key or the right mouse button while clicking each field you want to select.

4. Choose the Add button.

   The fields you selected appear in the Fields Chosen list.

5. Take one or more of the following actions:

   - To remove a field from the Fields Chosen list, select the field, and then choose the Remove button.
   - To change the order in which a chosen field appears on the form, select the field, and then choose either the Up or Dn Reorder button.
   - To create a new entry field, choose the New Field button. In the New Field & Column dialog box, enter a name for the new field and select its type.

6. Choose the OK button.

   The new entry form appears.

7. Choose the OK button again to return to the PhoneBook window.

Displaying and Hiding PhoneBook Entry Forms

Use the Change PhoneBook Form submenu to switch between entry forms. Use the Hide Form command on the PhoneBook menu to show or hide the PhoneBook entry form.

To display a different PhoneBook entry form

1. From the PhoneBook menu, choose Change PhoneBook Form.

2. From the Change PhoneBook Form submenu, choose a PhoneBook entry form.

To show or hide the PhoneBook entry form

From the PhoneBook menu, choose Hide Form to display or hide the PhoneBook entry form. The form is either displayed or hidden. You can also use CTRL+ALT+H to display or hide the PhoneBook form.

Managing Multiple PhoneBook Entry Forms

ECCO lets you edit or rename existing PhoneBook entry forms, delete forms, reorder forms on the Change PhoneBook Form submenu, or make forms public. You perform all these tasks from the Manage Phone Forms dialog box.

To manage PhoneBook entry forms

1. From the PhoneBook menu, choose Change PhoneBook Form, and then choose Manage.

The Manage Phone Forms dialog box appears.

2. Take one or more of the following actions:

   - To rename a form, select it, and then type the new name in the Rename field.
   - To create a new form, choose the New button.
   - To edit a form, select it, and then choose the Edit button.
   - To delete forms, select them, and then choose the Delete button.
   - To reorder forms on the menu, select them, and then choose either the Up button or the Dn button.
   - To make forms public (they must be made private first), select them, and then select the Make Public checkbox in the lower-right corner of the dialog box.

3. When you have finished, choose the OK button.

Introduction to Finding PhoneBook Information

You can find and display PhoneBook entries in three ways:

- Click a letter tab to display all entries whose first name, last name, company, or any other field begins with that letter. The letter tabs are located along the left side of the PhoneBook window.
- Search for entries that contain certain text.
- Query the PhoneBook to perform a more sophisticated search.

Specifying Search Options

Before clicking a letter tab or searching for a string of text, you can specify whether you want to search by last name only or by last name and:

- first name
- notes
- company name and all other PhoneBook fields

You specify these options in the Search Options dialog box.

To specify search options

1. From the PhoneBook menu, choose Search Options.

   The Search Options dialog box appears.

2. By default, ECCO always searches by last name. In the Search Options dialog box, do one or more of the following:

   - To search by last name only, deselect all checkboxes.

- To search by first and last name, select the First Name checkbox.
- To search by last name and outline notes, choose Notes.
- To search by last name and company, or last name and all other PhoneBook fields, choose Company or Fields.

3. Choose the OK button.
4. Search for PhoneBook entries by clicking a letter tab or searching for specific text.

Searching Using the PhoneBook Letter Tabs

You can quickly find the name you want by clicking the letter tab associated with the first letter of the name.

To search using the letter tabs

1. To specify search options, from the PhoneBook menu, choose Search Options.

   The Search Options dialog appears.

2. Click a letter tab to display all entries beginning with that letter. If you selected Company or Fields in the Search Options dialog box, a pop-up menu appears.
3. From the pop-up menu, choose one of the following:
   - To display all entries with names beginning with that letter, choose Name.
   - To display all entries with company names beginning with that letter, choose Company.
   - To display all entries that have any field beginning with that letter, choose Fields.

ECCO searches for, and collects in the PhoneBook list, all entries that match the specified letter.

Searching for Specific Text

You can search for entries in the PhoneBook using multiple letters, a word, or a phrase. You search for specific text using the Search For field, located on the PhoneBook toolbar.

To search for specific text

1. To specify search options, from the PhoneBook menu, choose Search Options.

   The Search Options dialog appears.

2. In the Search For field, type the text you want to search for.
3. Choose the Search button. If you selected Company or Fields in the Search Options dialog box, a pop-up menu appears.

4. From the pop-up menu, choose one of the following:
   - To display all entries whose name or notes contain the specified text, choose Name & Notes.
   - To display all entries whose company names contain the specified text, choose Company.
   - To display all entries that have any field containing the specified text, choose Fields. ECCO searches for, and collects in the PhoneBook list, all entries that match the specified text.
5. Choose the Next button in the PhoneBook toolbar to highlight the first instance of the search text in the entries collected in the PhoneBook list.
6. Continue choosing the Next button to move to each subsequent instance of the search text.

Querying the PhoneBook

Use the Query By Form dialog box to search for entries matching specific criteria. To display the Query By Form dialog box, choose the Query button.

For example, you may want to search for all clients who live in the Seattle area and who have a 98111 ZIP Code. Or, if you have international clients, you could easily search for all clients from a particular country using the Query By Form dialog box.

When querying, you can specify that ECCO match:

- all fields containing the search text
- any field containing the search text
- text beginning with the specified search text
- text containing the specified search text

You can use a filter to limit your search even further, using columns not displayed in the Query By Form dialog box. For more information on filters, see the chapter or online help "Other ECCO Features."

To query the PhoneBook

1. Choose the Query button on the toolbar.

   The Query By Form dialog box appears.
2. Type search text into one or more PhoneBook fields.
3. Under Must Match, do one of the following:
   - Select the Every Field option to search for entries that match all sets of search text.

- Select the Any One Field option to search for entries that match any of the sets of search text.

4. Under Text, do one of the following:
   - Select the Begins With option to search for entries that begin with the text.
   - Select the Contains option to search for entries that contain the search text.
5. If you want to add a filter to your query, choose the Advanced button.
6. Select the column and item (such as Text contains), enter the correct item in the Value field, then choose the Add button. The search filter is added to the Find entries that match text box in the Advanced Query Filter dialog box.
7. Choose the Close button to close the Add to filter dialog box.
8. Choose the OK button to return to the PhoneBook window. If there are already entries in the search filter, the Advanced Query Filter dialog box appears.
9. Choose the Add Line button to add a new entry to the search filter.
10. Choose the Modify button to change an existing entry in the search filter.
11. Choose the Delete button to remove an entry in the search filter.
12. Choose the OK button when you are done defining additional search criteria.
13. Choose the Search button. ECCO searches for, and collects in the PhoneBook list, all entries that match your query.

About Displaying PhoneBook Information

If the PhoneBook contains more information than ECCO can display at one time, you can scroll through the PhoneBook, hide parts of the PhoneBook, or resize sections of the PhoneBook so you can see more information.

When displaying and viewing PhoneBook information, you can select an entry and view all its information in the entry form.

- Sort the entries in the PhoneBook list. For example, you could sort the list by company name.
- Apply filters to your PhoneBook. For example, you might create a filter to display all entries that have the same ZIP Code.
- Display all entries in the entire PhoneBook in the PhoneBook list.

Displaying All PhoneBook Entries

When you search for entries in the PhoneBook using the letter tabs, the Search box, or the Query By Form dialog box, ECCO displays only the entries that match your search text. Using the following procedure, you can display your entire PhoneBook.

To view all PhoneBook entries

- From the PhoneBook menu, choose Show All Names. ECCO displays all names in your PhoneBook.

  Or

- Choose the Search button with the Search for entry field blank.

Introduction to Dialing and Logging Calls

ECCO lets you keep track of the date, time, and duration of any call. And if you have a modem on the same line as your telephone, ECCO can dial phone numbers for you.

Dialing and logging is performed through the Dialer/Call Logger dialog box. To display the Dialer/Call Logger dialog box, choose the Telephone button on the PhoneBook toolbar, or choose the Dial Phone command from the PhoneBook menu.

Setting Up Your Modem

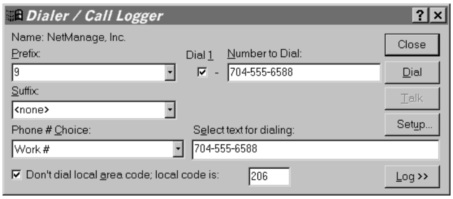
By default, ECCO uses the Ports setting in the Control Panel. ECCO also uses basic Hayes® prefix and suffix settings. You should only need to verify that the correct COM port for your modem is selected.

To set phone dialer settings

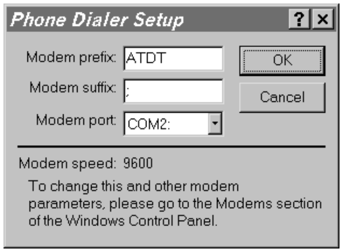
1. From the PhoneBook menu, choose Dial Phone.

   Or

   Choose the Telephone button. The Dialer/Call Logger dialog box appears.



2. Choose the Setup button. The Phone Dialer Setup dialog box appears.



3. In the Prefix box, enter your modem's prefix or accept the default.
4. In the Modem Suffix box, enter your modem's suffix or accept the default.
5. In the Modem Port box, select the communications port to which your modem is connected.
6. Choose the OK button.

Troubleshooting

If you experience problems when dialing from ECCO, consult the TECHINFO.ECO file for troubleshooting techniques, access the NetManage News Server at forum.netmanage.com, or call NetManage ECCO Technical Support at (206) 885-0559.

Dialing

If you have a modem, you can use ECCO to dial your phone numbers.

To have ECCO dial a phone number

1. Select the name of the person you want to call.
2. From the PhoneBook menu, choose Dial Phone.

   Or

   Using the right mouse button, select the name, and choose Dial Phone from the menu. The Dialer/Call Logger dialog box appears.
3. In the Prefix box, enter a dialing prefix (for example, 9 for an outside line).

4. In the Suffix box, enter any additional numbers to be dialed (for example, an extension or a calling card number). For a 5-second delay before the suffix is dialed, precede the suffix with a comma.

5. In the Phone # Choice box, select the type of phone number you want to dial (for example, Work #, Home #, or Fax #).

6. The phone number appears in the Number to Dial field. In the Select text for dialing field, you can select only part of the number you want to dial. The highlighted text will appear in the Number to Dial field.

7. If you want ECCO to omit the local area code when dialing, select the Don't dial local area code; local code is checkbox, and then type your area code in this field.

8. Choose the Dial button.

   ECCO dials the number for you.

9. When the connection begins ringing, pick up the phone receiver, and then choose the Talk button to begin your conversation.

Note: If your phone is plugged into the "Phone" jack on your modem, you may not be able to hear or use the handset until the Talk button is chosen. Many modems disable the phone jack while the modem is in use.

10. When the call is complete, hang up the phone, and then choose the Close button.

Logging Calls

ECCO can track the time, date, and duration of every call you make. All *you* need to provide is a description of the call. ECCO logs the duration of a call in five-minute increments.

To log a call

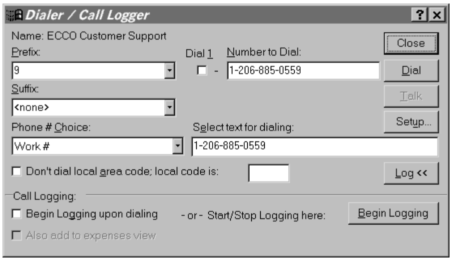
1. Select the name of the person you want to call.

2. From the PhoneBook menu, choose Dial Phone.

   The Dialer/Call Logger dialog box appears.

3. Choose the Log >> button.

   The Dialer/Call Logger dialog box expands to display the Call Logging button.



4. Dial the number manually, and then choose the Begin Logging button.

   ECCO begins logging the duration of your call and inserts a "Logged Call" subitem under the contact's name

5. Choose the Close button to stop logging your call.

To view time, date, and duration of a logged call

1. Scroll through the column pane to find the Phone Log column. If the column pane is not displayed, choose Show Columns from the Column menu.

2. In the Phone Log column, click the cell associated with the call for which you want information. A date value edit box displaying the date, time, and duration of the call appears. Logging durations are kept in five minute increments. When you have finished viewing the information, choose the ENT (Enter) button or the ESC button.

Logging Time

There are times when you may want to log the duration of activities that are not phone related. For example, you may want a record of the time spent writing a contract or researching a topic for a client. ECCO provides a time logging feature for tracking these tasks.

To log the duration of a task

1. From the Tools menu, choose Time Logger.

   The Time Logger dialog box appears.

2. Select one of the following options:

   - **Below Selected Item:** Adds a blank subitem and begins logging.
   - **To Time & Expenses View:** Adds to the Time & Expenses view if it exists; if it doesn't exist, it creates one.
   - **To Both:** Adds the logged item below the selected item and to the Time & Expenses view.

3. To start timing the activity, choose the Begin button.

   The Elapsed Time dialog appears.

4. Add notes about the task to the "Time Logged" item.

5. When you are finished, choose the Done button.

   ECCO logs the duration of the task in five-minute increments.

Importing, Exporting, and Mail Merge

You can import into the PhoneBook an existing database or text file of names, addresses, and numbers. Or, you can import phone book information from another personal information manager into your ECCO PhoneBook. You can import these files in two formats: .TXT (text) or .CSV (comma-separated values).

You can also export PhoneBook information to other programs. For example, you can export PhoneBook entries to a word-processing program and use the program's mail-merge feature to print form letters. For more information see the chapter or online help on “Importing and Exporting.”

Using the PhoneBook with the Calendar

You can display the PhoneBook and Calendar side by side by choosing the Calendar/PhoneBook button or by choosing the Use with Calendar command from the PhoneBook menu. You can then schedule an appointment with anyone in your PhoneBook list by dragging a name from the PhoneBook to a time slot in the Calendar.

To schedule an appointment using the PhoneBook

1. From the PhoneBook menu, choose Use with Calendar.

   Or

   Choose the Calendar/PhoneBook button.

2. In the PhoneBook list, point to the item bullet next to the name you want and hold down the mouse button. The pointer changes to a plus sign.

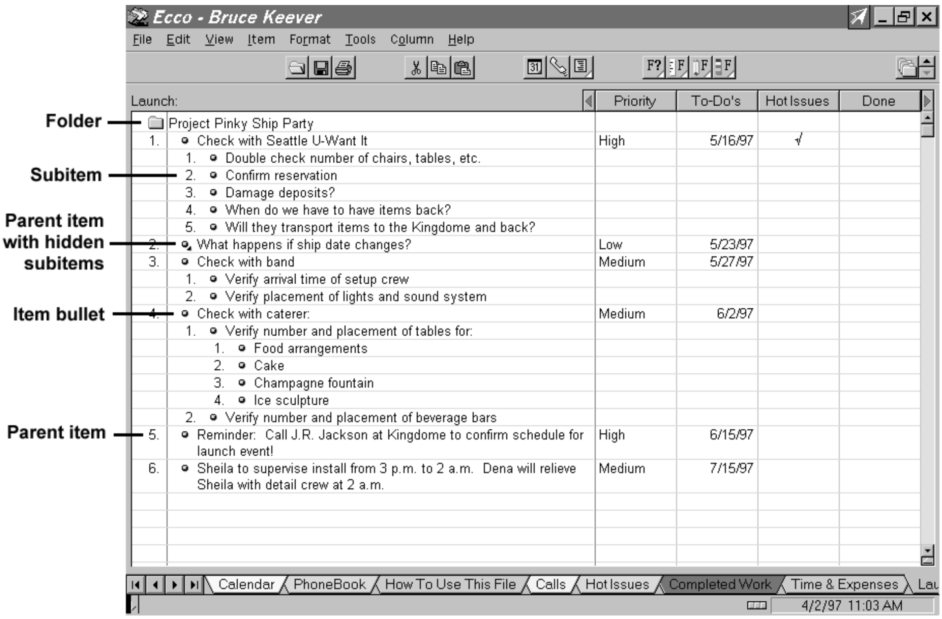
3. Drag the name to the time slot you want.

4. The appointment is scheduled in the Calendar. ECCO creates a subitem for the appointment in the PhoneBook. If you have an Appointments column in the PhoneBook, ECCO also displays the appointment date there.

Chapter 5. The Notepad and Outlining

In this chapter, you will learn about:

- About Notepads and Outlining
- Using Notepads
- Using Outline Notes
- Elements of an Outline
- Creating Notepads and Outline Notes
- Working with Notepads and Outlines
- Viewing Outline Items
- Managing Notepads
- Using Columns in a Notepad



The following outline elements are common to both the Calendar and PhoneBook:

- **Item bullets:** Blue bullets that appear next to each outline item. Yellow bullets indicate shared or public items.
- **Folder:** The container that holds items displayed in the outline. Notepad outlines can contain multiple folders.
- **Parent item:** An item that has one or more subitems. A black triangle next to the item bullet indicates the presence of hidden subitems.
- **Subitem:** An item that is subordinate to another item; in other words, an item below and to the right of another item.

About Notepads and Outlining

Outlining is a fundamental part of information management in ECCO. Notepads are outline structures that let you create and organize information in ways that best suit your needs. In the Calendar and PhoneBook, outlines are called *outline notes*; you use them to enhance Calendar and PhoneBook entries by adding detailed information specific to appointments or individuals.

Using Notepads

Unlike the PhoneBook (with its alphabetical organization) and the Calendar (with its chronological organization), the Notepad has no predefined structure. Information in a Notepad can be arranged in any way that best suits your needs. For example, a reporter doing a three-part series on American film might have one Notepad structured by genre, another structured by director name, and a third organized by studio name. Each of these Notepads would be an individual folder and, when open, would be accessible from the tabs at the bottom of the ECCO program window.

Note: To move a parent item independently of its subitems, first promote the subitems to the level of the parent.

Using Outline Notes

Outline notes are pieces of information that enhance information in the Calendar or PhoneBook. For example, to help remember specific tips for dealing with particular subcontractors, created detailed outline notes for each subcontractor's PhoneBook entry.

Creating Notepads and Outline Notes

It's easy to create Notepads and outline notes.

To create a new Notepad

1. From the View menu, choose Notepads, and then choose New Notepad.

   The Create Notepad dialog box appears.

2. In the Name Notepad box, type a descriptive name.

3. Choose the OK button.

   ECCO displays a new Notepad. The name you provided appears as the folder name at the top of the Notepad as well as in the title bar. The next time you choose Notepads from the View menu, the name will appear on the submenu.

Adding Outline Items

You can quickly add outline items to the Calendar, PhoneBook, or Notepad.

To add outline items

1. Press the ENTER key. The new item will appear below the selection and will be at the same level as the selection. If the selection has expanded subitems, the new item will be subordinate to the selection.

   If you're adding outline notes to a Calendar or PhoneBook entry, the new item will be subordinate to the selection.

You can also add outline items below the selection by using the following keyboard shortcuts or Item menu commands:

Result	Menu Command	Key Command
Adds item at same level as selected item	Add Item	CTRL+ENTER
Adds subitem one level to the right of the selected item	Add Item Right	CTRL+R
Adds item one level to the left of the selected item	Add Item Left	CTRL+L

To insert carriage returns or tabs within the selected item, use the following keyboard shortcuts and Edit menu commands:

Result	Menu Command	Key Command
Adds carriage return at the insertion point	Insert New Line	SHIFT+ENTER
Adds tab at the insertion point	Insert Tab	CTRL+T

Selecting Outline Items

Before you can promote, demote, move, or delete an outline item, you must select it. Selected items have a black bar to the left of the item bullet and are highlighted.

To select a single item

- Click the item bullet or any of the item text.

To select multiple sequential items

- Drag to select the desired items (they will be highlighted).

  Or

- Click one item, hold down the SHIFT key, and click the final item in the group.

To select multiple non-sequential items

- Hold down the CTRL key and click each item you want to select.

Promoting, Demoting, and Moving Outline Items

You can promote or demote any outline item (or group of items) from one level to another. You can also move outline items. And, if you're working in a Notepad outline that contains multiple folders, you can even move items between the folders.

The following rules regulate promotion, demotion, and movement of items:

- Subitems are relocated with their parent item.
- An item can be no more than one level below the item that precedes it.
- An item can be no more than one level above the item that follows it.

To promote, demote, or move outline items

Use the following techniques to promote, demote, or move selected outline items. You can also move items using the Cut and Paste commands on the Edit menu.

Result	**Item Menu Command**	**Mouse Technique**	**Key Command**
Moves selection up one item	Move: Up	Drag item bullet up	ALT+UP ARROW
Moves selection down one item	Move: Down	Drag item bullet down	ALT+DOWN ARROW
Promotes selection (moves it left) one level	Move: Left	Drag item bullet left	SHIFT+TAB or ALT+LEFT ARROW

Demotes selection (moves it right) one level	Move: Right	Drag item bullet right	TAB or ALT+RIGHT ARROW

Deleting Outline Items

You can delete one or more outline items from the Calendar, PhoneBook, or Notepad.

To delete outline items

1. Select the item(s) you want to delete.
2. From the Edit menu, choose either the Cut command or the Delete Items command.

   Or

3. Press CTRL+D or the DELETE key.

Viewing Outline Items

You have control over the amount of outline information that appears on your screen. You can

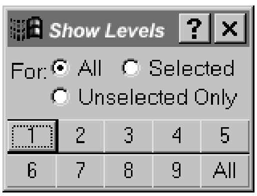
- Use the Show Levels dialog box to specify the number of outline levels you wish to see.
- Expand and hide outline items individually.

To use the Show Levels dialog box

1. From the Item menu, choose the Show Levels command.

   Or

   Press CTRL+W. The Show Levels dialog box appears.



2. Select one of the following options in the Show Levels dialog box:

- **All:** Displays the entire outline at the level you specify.
- **Selected:** Displays the selected parts of the outline at the level you specify.
- **Unselected Only:** Displays the unselected parts of the outline at the level you specify.

3. Choose a numbered button.

   The outline immediately displays the number of levels you specified.

To expand and hide outline items individually

Use any of the techniques in the following list to expand and hide subitems of the selection:

Result	**Item Menu Command**	**Mouse Technique**	**Key Command**
Hides all subitems	Show Subitems: Hide	Double-click item bullet of expanded item	CTRL+H
Displays specified number of levels	Show Levels	None	CTRL+1....9
Returns the display to its previous state	Show Subitems: Expand	Double-click bullet of the item with hidden subitems	CTRL+E
Displays a specific number of levels for the selected item	Show levels	None	SHIFT + CTRL + 1....9
Expands all subitems	Show Subitems: All Subs	ALT+double-click	CTRL+G
Shows one level below the selected item	Show Subitems: 1 Level Only	CTRL+double-click	CTRL+J

Managing Notepads

To edit, rename, or delete Notepads, or to reorder the Notepads submenu, use the Manage Named Notepads dialog box.

To manage Notepads

1. From the View menu, choose Notepads, and then choose Manage. The Manage Named Notepads dialog box appears.

2. Take one or more of the following actions:
   - To rename a Notepad: Select it, and then type a new name in the Rename box.
   - To delete Notepads: Select them, and then choose the Delete button.
   - To reorder Notepads on the menu select them, and then choose either the Up or Dn reorder button.
3. When you have finished, choose the OK button (or choose Cancel to exit the dialog box without saving changes).

Entering Information in Columns

To display the column pane, choose the Show Columns command from the Column menu. The column pane appears to the right of your Notepad.

You can use the column pane to associate dates, pop-up list values, numbers, and text with items in your Notepad. For example, you can assign a date to an item using the To-Do's column or assign an item a priority using the Priority pop-up list column.

To enter information in a column

The columns displayed when you choose the Show Columns command will vary depending on the template you are using.

1. From the Columns menu, choose Show Columns. The column pane appears at the right side of the window.
2. To enter additional information about an item in the outline, click a column cell on the same line as the item.

   Or

   Press the F11 key to move the selection to the column pane, and then press the ENTER key. ECCO displays a value edit box in which you can enter information.
3. Enter information in the value edit box. ECCO might display a value edit box requiring a specific type of information, such as a date or number. If you type more characters than will fit in the box, the text scrolls up so you can continue to enter information.
4. When you have finished entering information, press the ENTER key or choose the ENT (Enter) button. The value edit box disappears, and ECCO displays only the amount of text that fits into the visible column cell.

Resizing the Column Pane

You can quickly adjust the column pane border to display the information you need.

To adjust the width of the column pane, use the mouse to drag the left border of the pane.

You can adjust the display of the individual columns as described in the following table:

Adjustment	Column Menu Command	Mouse Procedure
Resize a column	Width	Drag border of column heading
Minimize or restore a column	Width (Minimize checkbox in the Column Width dialog box)	Double-click column heading
Move a column	Move Column	Drag column heading

Showing More Columns

You can have up to 100 columns in the column pane of each view. If you have more columns than can be displayed at one time, use the column scrolling buttons to view more columns. The column scrolling buttons are located on each side of the column headings.

- To show columns to the left, click the left column scrolling button.
- To show columns to the right, click the right column scrolling button.

Chapter 6. Working with Items and Formatting

About Working with Items and Formatting

In all ECCO views, you can work with your items to make information more easily accessible. You can:

- Format text and create styles or change labels for your outline levels.
- Search for specific information.
- Sort items.
- Drag and drop items between views to quickly copy information, schedule appointments, and add items to folders.

About Formatting

You can format item text and column values in every ECCO view. Formatting attributes such as bold, underline, color, or italics add emphasis or call attention to special points. Changes in font and point size can enhance readability or create special effects. Outline styles and outline labels help you differentiate levels of outline items.

Four types of formatting are available:

- **Character formatting** lets you emphasize items, words, or column values.
- **Text touch-ups** are a group of character-formatting attributes that you define once and use repeatedly.
- **Outline styles** are distinctive formatting attributes that you can associate with outline levels.
- **Outline labels** are letters or numerals you can use to label outline levels and clarify the structure of your outline.

Note: To increase efficiency, customize the toolbar so that it contains the formatting commands you use most frequently. For more information, the chapter or online help on “Using the Toolbar.”

Character Formatting

Use character formatting to change the font, point size, style, and color of your text. You can apply one or more attributes at a time to items, text within an item, or to all values in a column.

Note: Character formatting overrides, but does not change, outline styles.

Use character formatting to change selected text

To format characters

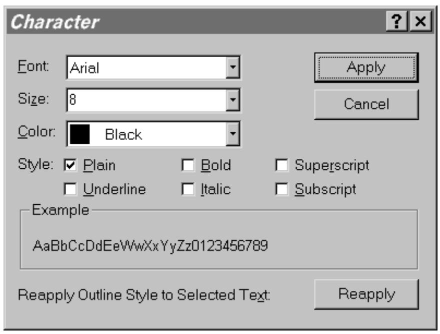
1. Highlight the item(s) or text within an item you want to format.

   Or

   Click a cell in the column you want to format. Column formatting will apply to all values in the selected column.

2. From the Format menu, choose Character.

   Either the Character dialog box or the Column Character Format dialog box appears. These dialog boxes contain identical options.



3. Select the desired formatting attributes.

4. Choose the Apply button.

Note: To apply a single format, simply highlight the text you want to format and choose the desired attributes from the Format menu. The Character command is also available if you click the right mouse button in the Column pane or a Notepad view.

Text Touch-Ups

A *text touch-up* is a group of character-formatting attributes that you name and store. You can apply text touch-ups in any ECCO view.

Suppose, for example, that you want to make particular items in your file stand out. You could create a text touch-up to apply bold and italic formatting simultaneously. Because you name text touch-ups and add them to the Text Touch-Ups menu, you can use them repeatedly. ECCO saves text touch-ups whenever you save a file.

Text touch-ups override, but do not change, outline styles.

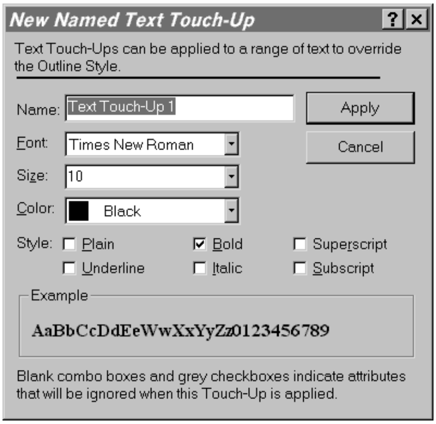
Creating Text Touch-Ups

You create a new text touch-up by specifying formatting attributes in the New Named Text Touch-Up dialog box.

To create a text touch-up

1. From the Format menu, choose Text Touch-Ups, and then choose New.

   The New Named Text Touch-Up dialog box appears.



2. In the Name box, type the name you want to give the text touch-up.

3. Select the desired formatting attributes.

4. Choose the Apply Button.

Applying Text Touch-Ups

Once you create a text touch-up, you can apply it to text anywhere in ECCO.

To apply a text touch-up

1. Highlight the item text or column to which you want to apply a text touch-up.

2. From the Format menu, choose Text Touch-Ups, and then choose the text touch-up you want to apply.

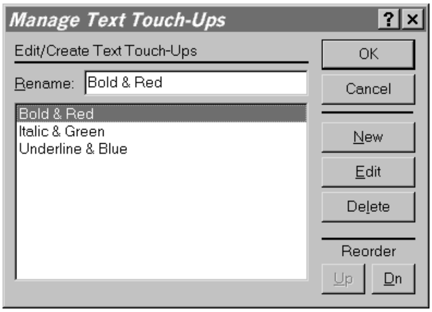
Managing Text Touch-Ups

You can edit, rename, or delete existing text touch-ups or reorder text touch-ups on the Text Touch-Ups menu.

To manage named text touch-ups

1. From the Format menu, choose Text Touch-Ups, and then choose Manage.

   The Manage Text Touch-Ups dialog box appears.



2. Take one or more of the following actions:
   - To rename a text touch-up, select the touch-up, and then type the desired name in the Rename box.
   - To create a new text touch-up, choose the New button.
   - To edit a text touch-up, select the touch-up, and then choose the Edit button.
   - To delete text touch-ups, select one or more touch-ups, and then choose the Delete button.
   - To reorder text touch-ups on the menu, select one or more touch-ups, and then choose either the Up or Dn Reorder button.
3. When you have finished using the Manage Text Touch-Ups dialog box, choose the OK button.

Outline Styles

An *outline style* is a set of character-formatting attributes associated with a particular outline level. Using different outline styles for each level makes it easier to distinguish visually between outline levels. For instance, you could format every first-level item as 10-point, bold, and Helvetica; and every second-level item as 10-point, italic, and Times New Roman.

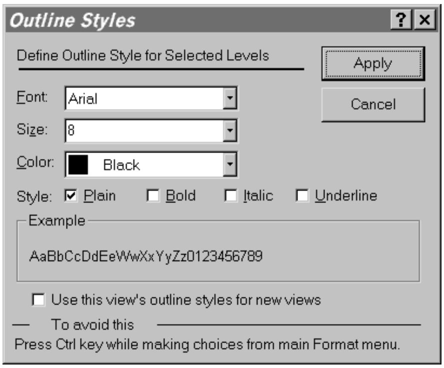
Note: Although you can create outline items and subitems in any ECCO view, the outline styles you create apply only to the active view.

You can use different outline styles for each level of your outline.

To format using outline styles

1. Select item(s) that represent the outline level(s) you want to format.

2. From the Format menu, choose Outline Styles. The Outline Styles dialog box appears.



3. the desired formatting attributes.

4. Choose the Apply button.

Note: You can also create outline styles by selecting one or more items that represent the appropriate level(s), holding down the CTRL key, and choosing the desired attributes from the Format menu.

To reapply an outline style

You can reapply an outline style to an item or word that has already been formatted with a character format.

1. Highlight the text or click a cell in the column to which you want to reapply the outline style.

2. From the Format menu, choose Character.

   The Character dialog box appears.

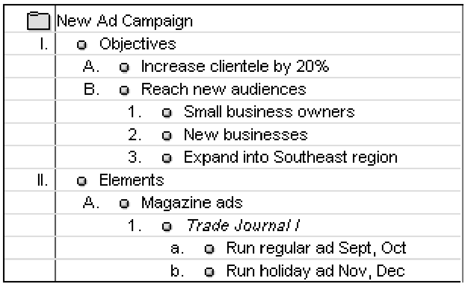
3. Choose the Reapply button.

Labeling an Outline

By default, each outline item is labeled with a numeral. But you can define a set of custom outline labels to identify the levels of any outline items. For example, you could use uppercase letters for level 1 items, lowercase letters for level 2 items, and so on. Once you name and save a set of labels, you can apply it to any outline.

Default outline labels

Custom outline labels



Note: Folders in the Folder window can also be labeled. By default, outline labels for folders are not displayed.

Creating Outline Labels

When you create a set of outline labels, you can:

- Use Roman or Arabic numerals and uppercase or lowercase letters.
- Add prefix or suffix characters (such as brackets, periods, or any characters you want to use).
- Make labels cumulative, so that each item includes the labels of all the levels above it. For example, the second third-level item in an outline might be labeled 1.1.2.
- Name a set of labels so that you can reapply it to any view.
- Base a new set of labels on an existing set.

To create a set of outline labels

1. From the Format menu, choose Outline Labels, and then choose New.

   The Outline Labels dialog box appears.

2. In the Rename box, type a name for the set of labels.

   ECCO adds this name to the Outline Labels menu.

3. Select one or more outline levels.

4. Make any of the following changes:

   - Select a label from the Label box.
   - Select or type a prefix or suffix in the Prefix or Suffix box.
   - Select the Cumulative checkbox to make each item in the selected levels include the labels of all levels above it.
   - Choose the Based On button to use an existing set of labels as the basis for part or all of the new set.

5. When you have finished specifying your outline labels, choose the OK button.

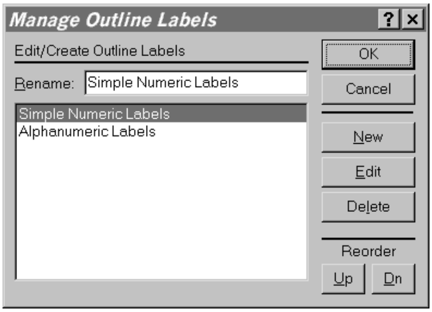
Managing Outline Labels

You can edit, rename, or delete existing named outline labels, and reorder outline labels on the Outline Labels menu.

To manage named outline labels

1. From the Format menu, choose Outline Labels, and then choose Manage.

   ECCO displays the Manage Outline Labels dialog box.



2. Take one or more of the following actions:

   - To rename a named outline label, select the label and type the desired name in the Rename box.
   - To create a new outline label, choose the New button.

- To edit an outline label, select the label, and then choose the Edit button.
- To delete outline labels, select one or more labels, and then choose the Delete button.
- To reorder outline labels on the menu, select one or more labels, and then choose either the Up or Dn Reorder button.

3. When you have finished using the Manage Outline Labels dialog box, choose the OK button.

Displaying Outline Labels

In some situations you might want to change how outline labels are displayed. For example, in a simple one-level outline, you might find labels distracting. You might want to include unlabeled, blank items in your outline to create space between sections. Or, you might want to restart the numbering sequence in the middle of the outline.

Choose Outline Labels from the Format menu, and then use the following commands to change how labels are displayed:

Use	**To**
Show Labels	Display or hide all outline labels.
Skip Label & Icon	Hide or display the label(s) and item bullet(s) for the selected item(s).
Restart Sequence	Restart the alphabetical or numerical label sequence beginning with the selected item.

Finding Items

Use the Find, Find Next, and Find/Replace commands when you need to find item text or column values anywhere in your ECCO file.

To quickly find a specific word or string of text, use the Find command. To replace all instances of a specific word or string of text with other text, use the Find/Replace command.

Using the Find and Find/Replace commands, you can:

- Find a specified string of text in order to reformat, edit, delete, promote, or demote it.
- Update all instances of the specified string of text with a different string of text.
- Add to the Search Results view all items in the file that contain the text.
- Apply a filter to find only those items that match specified criteria.

In the Folder window, you can find text in folder names by choosing the Find command from the Edit menu, or by choosing the Find Folder command from the Folder menu. For more information, see the chapter or online help on “Folders.”

Note: You can continue to promote and demote items, apply formats, edit text, and perform other tasks using menu commands while the Find dialog box is open.

Finding Text Quickly

Use the Find command to quickly highlight the next instance of the specified text in the active view.

To highlight the next instance of the specified text

1. From the Edit menu, choose Find. The Find dialog box appears.

2. In the Find box, type the text you want to find.

   Or

   Click the down arrow and select from the list of previous searches.

3. Choose the Find button to highlight the next occurrence of the specified text.
4. Continue choosing the Find button to highlight subsequent occurrences.
5. When you have finished using the Find dialog box, press ESC.

To repeat the most recent search

From the Edit menu, choose Find Next.

Specifying Further Search Options

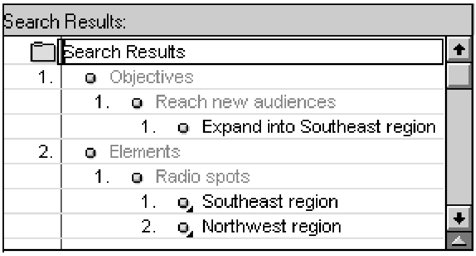
Using the Find command, you can:

- Search the active view or the entire file.
- Search within item text, column values, or both.
- Apply a filter to find only those items that match the specified criteria. You can use a filter to find items whether you specify search text or not.
- Collect the results of your search into the Search Results view.

The Search Results view allows you to collect and work with similar items all in one place. For example, you could collect all items concerning an employee so that you could review them, edit them, or copy them to a Notepad view to preserve the results of the search. You can also find “lost” items, which do not currently appear in any view, by searching the entire file and using the Search Results view.

The Search Results view is a Notepad, so you can add items to it or view it again later by choosing it from the Notepad menu. When your search results include subitems, they are displayed along with their context parents—green-shaded parent items that do not match the search criteria but appear in the Search Results view to provide context. For more information about context parents, see the chapter or online help on “Folders.”

Context parents appear as shaded items

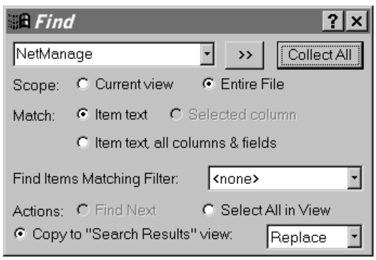


To specify further search options

1. From the Edit menu, choose Find. The Find dialog box appears.
2. In the Find box, type the text you want to find.

   Or

   Click the down arrow and select from the list of previous searches.
3. Choose the Unfold (>>) button to expand the Find dialog box. The Find dialog box expands, displaying additional options.



4. Beside Scope, specify whether you want to search the current view or the entire file.

   If you are in the Calendar, you can search all future dates or the entire file.

   Depending upon the option you select, other options in the dialog box may change slightly.
5. Beside Match, specify whether you want to search only item text, only column values, or both.

6. Beside Find Items Matching Filter, you can select an existing filter or select the Custom option and create a filter. For more information, see the chapter or online help on “Filters.”

7. Beside Actions, specify how you want to display the text you find:

   - To highlight the next occurrence of the specified text in the active view, select the Find Next option.
   - To highlight all items in the active view that contain the specified text, select the Select All In View option.
   - To copy all occurrences of the specified text to the Search Results view, select the Copy To “Search Results” View option. Then select either Replace (to replace the contents of the Search Results view with the results of your search) or Append (to append the results of your search to the contents of the view).

8. Choose either the Find button or the Collect All button.

9. When you have finished using the Find dialog box, press ESC.

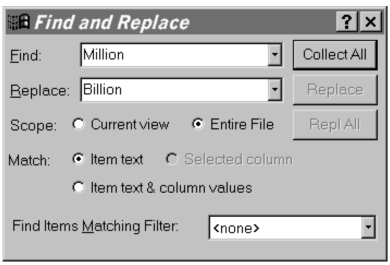
Finding and Replacing

When you need to change specific text, you can search for and replace it all at once or replace it selectively on a case-by-case basis.

To replace text

1. From the Edit menu, choose Find/Replace.

   The Find and Replace dialog box appears.



2. In the Find box, type the text you want to find.

   Or

   Click the down arrow and select from the list of previous searches.

3. In the Replace box, type the replacement text.

   Or

   Click the down arrow to select from the list of previous replacements.

4. Beside Match, specify whether you want to search only item text, only column values, or both.
5. Choose the Find button. ECCO highlights the first occurrence of the text.
6. Choose one or more of the following buttons:
    - To leave the text unchanged and search for the next occurrence, choose the Find button.
    - To replace the text, choose the Replace button.
    - To replace all occurrences of the text without confirmation (rather than replacing occurrences one at a time), choose the Replace All button.
7. When you have finished using the Find And Replace dialog box, press ESC.

Note: In the Calendar, this procedure searches only the active pane.

Sorting Items

Sorting is the process that rearranges items in the order most meaningful to you.

A simple sort might arrange items alphabetically by their text. A more powerful sort might arrange items by alphanumeric value, using the values displayed in columns. ECCO gives you two sorting criteria, or *keys*. Choose the more significant criterion for the first sort key and the less significant for the second sort key.

For example, suppose you wanted to sort items in a project outline by priority. You could use the Priority column to sort items in order of High, Medium, or Low priority (or any other priority value you created) and then select the “<item text>” option to sort items with the same priority in alphabetical order.

In the Calendar, you can sort Tickler items by their event date, as well as by their item text and column values. You might want to use the event date and the Priority column to organize your reminders first by date and then by order of importance. Whenever you display a different day, week, or month, your Tickler items are sorted in the order you last specified.

You can sort all top-level items or the subitems of any selected items or folders. If you choose to sort subitems, only the items one level subordinate to the selected items or folders are sorted:

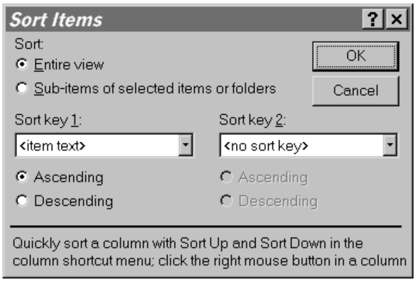
- If you select a folder, only first-level items are sorted.
- If you select a first-level item, only second-level items are sorted.
- If you select first and second-level items, only second- and third-level items are sorted.

To sort items

1. Select one or more folders or items.

   To sort subitems, select a folder or item that has subitems.

2. From the Tools menu, choose Sort. The Sort Items dialog box appears.



3. To sort all top-level items or Tickler items, select the Entire View option or the Tickler sections option.

   Or

   To sort subitems of selected items or folders, select the Subitems of Selected Items Or Folders option.

4. In the Sort Key 1 drop-down list, select your primary sort criterion:
   - To sort by item text, select <item text>.
   - To sort Tickler items by event date, select <event date>.
   - To sort by a value, select the name of the column or folder by which you want to sort. For more information about columns, see the chapter or online help on “Columns and Values.”

5. Specify whether you want to sort in ascending or descending order.

6. Optionally, select a second sort criterion and specify ascending or descending order.

7. Choose the OK button.

Note: To sort quickly by a column value, click the right mouse button in the desired column, and then choose Sort Up or Sort Down.

Drag and Drop

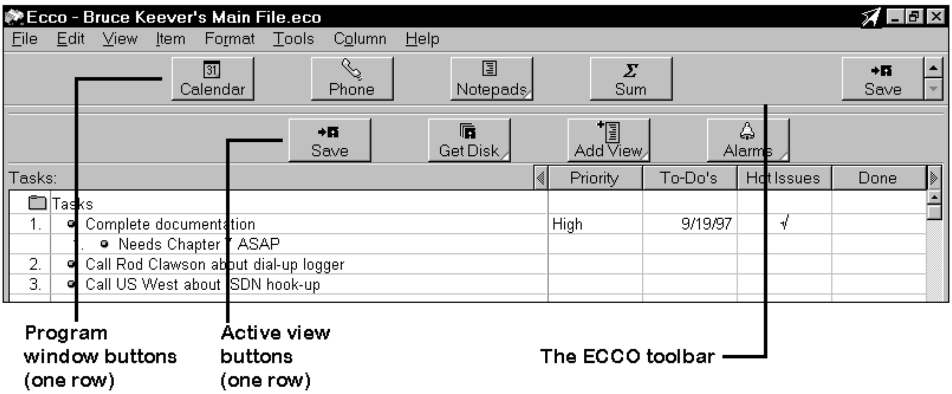
ECCO's *drag and drop* feature makes it easy for you to work with items and manage information:

- Drag items to promote, demote, or copy them.
- Schedule appointments in the Calendar by dragging names from the PhoneBook or by dragging items from any Notepad.
- Add items to folders by dragging them into a folder in the Folder window.

Chapter 7. Using the Toolbar

About the Toolbar

Using a mouse, you can perform tasks quickly and easily by choosing buttons on the ECCO toolbar. The toolbar can have up to six rows of buttons—three rows are associated with the ECCO program window, and three rows are associated with the active view. You get to determine how many rows (if any) are visible at any time.



Note: You can also display a toolbar in the Shooter. For more information, see the chapter or online help on "Using ECCO with Other Programs."

Toolbar Features

The customizable ECCO toolbar provides the following advantages:

- Convenient access to any ECCO command.
- Instant access to cascading submenus.
- Access to user-defined menu items (such as outlines, outline labels, and text touch-ups).
- Instant access to the last-accessed command (with the Repeat box).

Showing or Hiding the Toolbar

The ECCO toolbar can be made visible or invisible at the touch of a button.

To show or hide the toolbar

1. Click the Show/Hide Toolbar button in the status line.

   The toolbar will appear (or will disappear if it was previously visible).

Customizing the Toolbar

The default toolbar buttons in the ECCO program window are some of those most commonly used for file management and editing. But you can customize the toolbar to best suit your needs:

- Change the number of rows in the toolbar.
- Add buttons to the toolbar.
- Copy buttons. Use the *right* mouse button to drag a copy from one section of the toolbar to another.
- Delete buttons. Use the *right* mouse button to drag them down to the view area.
- Change the size of the buttons.

To change the number of toolbar rows

1. From the Tools menu, choose Toolbar.

   The Toolbar dialog box appears.

2. In the Rows box, select the number of rows you want displayed in each section of the toolbar.

3. Choose the OK button.

To add a button to the toolbar

Note: For a complete guide to all ECCO buttons, see the chapter or online help on "Command Reference."

1. Choose a command from any ECCO menu. And to prevent the command from actually being carried out, be sure to drag the mouse off the menu *before* releasing the mouse button.

   The button corresponding to this command appears in the Repeat box at the top right of the toolbar.

2. Press the *right* mouse button and drag the command button from the Repeat box to the desired position on the toolbar.

Note: From the Tools menu, choose Toolbar, and then choose Add/Arrange Icons to display icons in the Repeat box without invoking the action.

To change toolbar button size

You have a choice of large toolbar buttons with captions (the default) or small toolbar buttons without captions.

1. From the Tools menu, choose Toolbar.

   The Toolbar dialog box appears.

2. Check or uncheck the Show Large Buttons with Captions checkbox.

3. Choose OK.

Reorganizing the Toolbar

After placing the desired command buttons on the toolbar, you can reorganize it at any time:

- Rearrange command buttons by dragging them. Use the right mouse button.
- Add or delete spaces between command buttons. Position the mouse cursor between the buttons, and press SHIFT+ the *right* mouse button.
- Arrange command buttons into groups (that is, delete the spaces between them), and then move these groups as single objects . Drag them while pressing CTRL+ the *right* mouse button.

Note: From the Tools menu, choose Toolbar, and then choose Add/Del Spaces or Arrange Groups. Then follow the instructions in the Description box.

Adding Submenus to the Toolbar

For added convenience, any submenu (or hierarchical menu) can be added to the toolbar. (It will appear as a drop-down menu when you click its command button.) This gives you simplified access to commands. For example, the conventional method for changing a font would require that you choose the Format menu, the Font menu, and then a font name; by adding the Font submenu as a button on the toolbar, you can choose a font directly from the drop-down menu.

To add a submenu to the toolbar

1. Choose a menu command that brings up a submenu.

   The button for the first item in the submenu appears in the Repeat box.

2. Click outside the menus to dismiss them.

3. Click the up arrow attached to the Repeat box.

The button for the submenu appears in the Repeat box. Buttons for submenus have a white triangle in their lower-right corner.

4. Use the *right* mouse button to drag the menu button from the Repeat box onto the toolbar.

Chapter 8. Printing

It's easy to print from each ECCO view. In this chapter you'll learn about:

- Printing a Calendar
- Printing a Notepad
- Printing a PhoneBook
- Printing columns
- Printing a Calendar
- Printing catalogs

When printing a Calendar you have the following options:

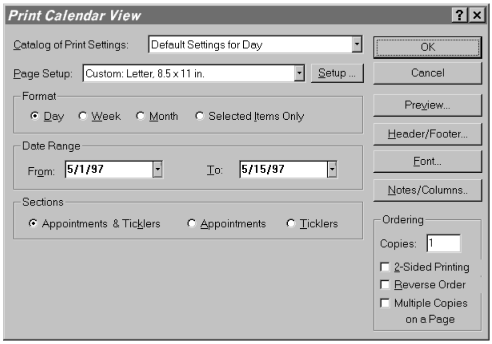
- Print summary pages (summary pages do not include subitems of appointments and ticklers).
- Print detail pages. When you print detail pages you can print all items, exclude hidden subitems, and specify the levels of subitems to include. You can also print any columns associated with your Calendar.
- Print the Appointment section, Tickler section, or both.
- Print items in a desired font.

A user name prints in the upper-left corner of the Calendar, and the time period prints in the upper-right corner. You can change the user name in the ECCO Options property sheet. Select the Options command on the Tools menu, select the Files tab, and then enter the name to be printed in the text field to the right of User name for report headings.

To print a Calendar

1. To print specific items, select them.
2. From the File menu, choose Print.

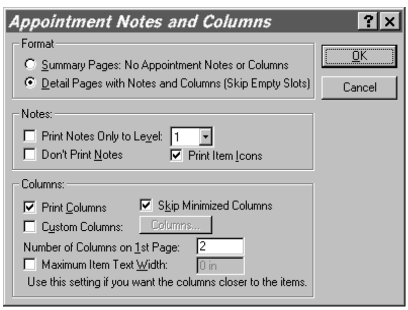
The Print Calendar View dialog box appears.



3. In the Catalog of Print Settings list, select one of the following:
   - A predefined Calendar Print Catalog Setting, such as Default Settings for Day or Default Settings for Month.
   - A user-defined Print Catalog that you've created.
4. In the Page Setup list, select the desired page size.

   Note: To add custom page sizes, select the Setup option. You can choose from page sizes that fit common organizer-style notebooks, including The Priority Manager™, DayTimer™, Franklin™, and most other popular day planners, as well as A4, A5, Legal, and Executive paper sizes.
5. Under Format, select the desired option.
6. Under Date Range, specify a start and end date for the information you want to print.
7. Under Sections, select Appointments, Ticklers, or both for printing.
8. Under Ordering, type the number of copies you want to print and, as desired, select 2-sided printing, reverse-order printing, or multiple copies on a page.
9. If you want to specify additional printing options, choose the Notes/Columns button.

   The Appointment Notes and Columns dialog box appears.



10. In the Outline Notes And Columns dialog box, take one or more of the following actions:

    - Select either Summary Pages: No Appointment Notes or Columns *or* Details Pages with Notes and Columns (Skip Empty Slots).
    - In the Notes section, select the options you want. You can do this only if you specified Details Pages in the Format section.
    - In the Columns section, select the options you want. You can do this only if you specified Details Pages in the Format section.

11. Choose OK.

12. As desired, choose the Font button to customize printout fonts. Choose OK to exit the Item Text Font dialog box.

13. Choose the OK button to print.

PhoneBook Entries

When you print PhoneBook entries you have the following options:

- Print the entire PhoneBook.
- Print items currently in the view.
- Print selected items.

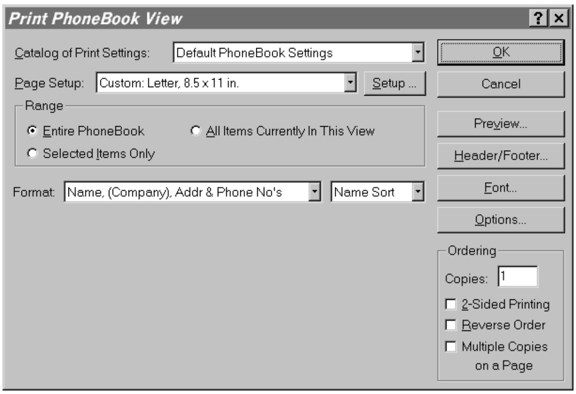
You may also specify what kind of information is printed for each item.

To print PhoneBook information

1. If you want to print specific items, select the items you want to print.

2. From the File menu, choose Print.

   The Print PhoneBook View dialog box appears.



Note: To print Calendar columns, you must select Details Pages in the Format section of the Outline Notes and Columns dialog box.

3. Choose the desired Catalog of Print Settings.

4. Choose the desired Page Setup.

   Note: If you are printing name and address only, you can choose standard page sizes, or you can choose Avery® label sizes. In the Range section, choose an option to specify what you want to print.

5. In the Format section, select the kind of information you want to print for each item, and specify a sort order.

   If you select a PhoneBook format option that includes columns, a Column button appears. Choose the Column button to display the PhoneBook Columns dialog box in which you can specify which columns to print, the width for the Name section, and the order and maximum width for each column.

   If you select a PhoneBook format option that includes forms, an option appears that lists the PhoneBook forms that have been created. You can select the PhoneBook form you want to print and how fields will be divided across the page.

6. Under ordering, enter the number of copies you want to print. And, as desired, specify 2-sided printing, reverse-order printing or multiple copies on a page.

7. If you want to set additional printing options, choose the Options button.

   The PhoneBook Options dialog box appears.

8. In the PhoneBook Options dialog box, take one or more of the following actions:

   - To insert a page break between entries beginning with a different letter, select the New Page at Start of Each Letter checkbox.
   - To switch the print order of names, select the Switch Lastname, Firstname to Firstname Lastname checkbox. This will cause titles such as Dr. or Ms. to appear in the entries as well.
   - Select whether you want *both* the home and business addressed to be printed.
   - In the Outline Notes section, select the desired options. You can do this only if you specified one of the Outline Note options in the Format section.

9. Choose the OK to close the PhoneBook Options dialog box.

10. Choose OK to print.

Printing Notepad Items

When you print Notepad items, you have the following options:

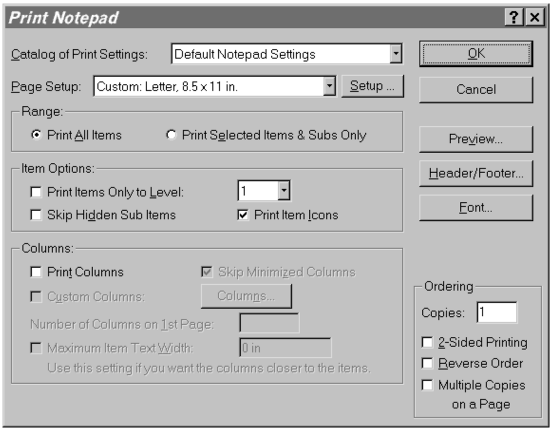
- Print all items in the Notepad.
- Print selected items in the Notepad.
- Print items to a specific outline level.
- Omit or print hidden subitems.
- Omit or print item bullets.
- Omit or print specific columns.
- Add headers and footers.

To print Notepad information

1. If you want to print specific items only, select the items.

2. If you want to omit subitems, hide them (by double-clicking the item they're subordinate to).

3. From the File menu, choose Print.



Note: If you are printing name and address only, you can choose standard page sizes, or you can choose Avery® label sizes. The Print Notepad dialog box appears, displaying the Default Notepad Settings.

4. In the Catalog of Print Settings list box, select a user-defined Notepad Print Catalog.

   Or

   Make any changes to the Default Notepad Settings. These changes are temporary.

5. In the Page Setup list box, select the page setup you want, or choose the Setup dialog box and specify your own page setup.

6. Under Range, select the Print All Items checkbox or the Print Selected Items Only checkbox.

7. Under Item Options, select the Print Items Only to Level, Skip Hidden Sub Items, and Print Item Icons checkboxes.

8. Under Columns, change the settings as necessary.

9. If you want to print a header or footer, choose the Header/Footer button and provide information as appropriate.

   Headers and footers are automatically centered on the page. If selected, the date appears in the lower-right corner of each page, and the page number appears in the lower-left corner.

10. Under Ordering, specify the number of copies to print and, as desired, check the boxes for 2-sided printing, reverse-order printing, or multiple copies on a page.

11. Choose the OK button.

Specifying the Page Setup

With the Page Setup feature, you can specify the following options:

- **Page size:** Dimension of the paper, height/width, orientation (portrait or **Page margins** Top, bottom, left, and right margins for the paper.
- **Print areas:** Number of forms (days, weeks, months, pages) to be printed across and down the page, space between rows and columns, and whether pages will be cut sheets.
- **Internal margins:** Top, bottom, left, and right margins for this page setup.
- **Envelope address positions:** (if printing envelopes) Print location for the return address and addressee.

To specify Page Setup

1. In the Page Setup section of the Print dialog box, choose the Setup button.

   The Page Setup dialog box appears.

2. In the Edit Settings For section, select the option for the characteristic you want to modify. The Paper section will change based on your selection.

3. In the Paper section, provide the requested information.

4. When you have finished making your selections, choose the OK button.

   Note: You can rename, delete, and reorder page setups using the Manage Page Setups dialog box.

Printing Options

A variety of options are available when you print ECCO views. The following sections describe these options in detail.

To preview your printing

To see a representation of how your printed page will look, use the Print Preview option.

1. From the File menu, choose Print.

   The Print dialog box for the view appears.

2. Choose the Preview button.

   The Print Preview screen, containing a representation of the page, appears. From this screen, you can move between sample pages by using the Next and Previous buttons. To leave the Print Preview screen and begin printing, press the Print button.

To specify two-sided printing

With ECCO you can have information printed on two sides of the page.

1. From the File menu, choose Print.

   The Print dialog box for the view appears.

2. When specifying your printing preferences, click the 2 Sided Printing checkbox.

   A series of dialog boxes will walk you through the two-sided printing process.

To specify reverse printing

With reverse printing, the last page of the document is printed first. This is useful for printers such as those in the HP DeskJet series that output pages in a “face-up” manner.

1. From the File menu, choose Print.

   The Print dialog box for the view appears.

2. When specifying your printing preferences, click the Reverse Order checkbox.

To specify multiple copies on a page

With multiple copies on a page, a form feed command is not sent to the printer between each copy.

1. From the File menu, choose Print.

   The Print dialog box for the view appears.

2. When specifying your printing preferences, click the Multiple Copies on a Page checkbox.

Catalog of Print Settings

A *print catalog* is a set of predefined print options. You can use the default print catalog settings or define your own print catalogs. A print catalog specifies the following:

- **Section:** You define settings for an ECCO view (PhoneBook, Calendar, or Notepad).
- **Format:** Select from a list of formats applicable to the section.
- **Page Setup:** Define the page size, area, margins, and orientation.
- **Range:** Select a range of items applicable to the section (for example, a date range for the Calendar).
- **Printer:** Select the printer to be used.
- **Header/Footer:** Specify the text and formatting to be used on headers and footers.
- **Font type and size:** Select the font and size used for printing.
- **Two-side, Reverse order, Multiple Copies on a Page:** Select options for print methods.

You can name and save any print catalog you define. To print using a predefined print catalog, select the name from the Catalog of Print Settings list box in the Print dialog box. You can also modify and rename existing print catalogs.

To print a catalog

1. From the File menu, choose Print Catalog.
2. From the submenu, choose the catalog you want to print.

   Printing begins immediately, using the attributes previously defined for the selected catalog. If you're printing a Notepad catalog, you must choose which notepad you want to print.

Printing Column Values

When printing Notepad or Calendar information, you can choose to print information from columns. You can

- Print all columns.
- Print selected columns.
- Omit printing (skip) minimized columns.
- Specify the number of columns to print on the page.
- Specify the maximum width of the columns that print.

To specify column-printing options

1. Display the Columns section of a dialog box. The Columns section for Notepads appears in the Print Notepad dialog box; the Columns section for Calendar appears if you choose the Notes/Columns button in the Print Calendar dialog box.
2. Choose Print Columns.
3. Select the Skip Minimized Columns option to prevent minimized columns from being printed.
4. Select the Custom Columns option to specify which columns should print, and then choose the Columns button. The Custom Columns dialog box appears. You can add any column to the printed view, even if the column doesn't normally appear in this view.
5. Select columns from the Choose Columns List, and then choose the Add button to add them to the Columns Chosen List.
6. Choose the OK button to close the Custom Columns dialog box.
7. Specify the number of columns you want printed on the first page and the maximum item text width.
8. Choose OK.

Chapter 9. Importing and Exporting

Introduction to Importing and Exporting

By importing and exporting, you can move database, spreadsheet, or text information between ECCO and other files.

- You can import phone book information from a personal information manager into your ECCO PhoneBook.
- You can export selected records from ECCO in a mail-merge format to your word-processing program.
- You can import or export spreadsheet information in a columnar format.
- You can combine information from two or more ECCO files by exporting information from one file and importing it into another.
- You can reduce the size of your ECCO file by archiving your old appointment and tickler items.
- You can export selected records from ECCO to a Timex® Data Link™ watch.
- You can synchronize records to and from a U.S. Robotics® Pilot™ PDA

You can import files in two formats: *tab-delimited text* or *comma-separated values* (CSV). A tab-delimited text file contains fields or categories of information separated by tabs. A CSV file contains fields enclosed in quotation marks and separated by commas. Most personal information manager, database, and spreadsheet programs allow you to save files in these formats.

You can export ECCO information to other programs by using the Export command on the File menu. The information can be in any of several formats—ECCO to ECCO, tab-indented, CSV, tab-delimited, and mail-merge. Mail merge information can be exported to major word-processing programs that use standard mail-merge formats.

Importing to the PhoneBook

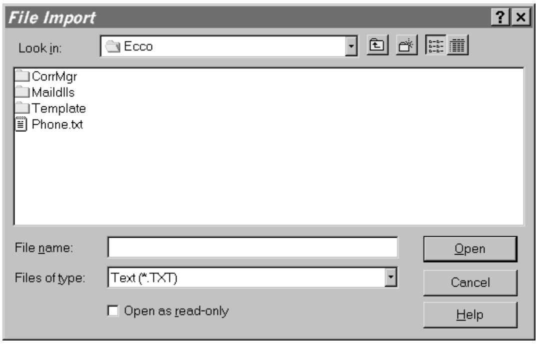
When you import a file into the PhoneBook, you can specify the fields you want to include as well as their ultimate location. Names and other identifying information normally appear as items in the PhoneBook; addresses, phone numbers, and most other typical information will appear in the PhoneBook entry form. New fields will appear as PhoneBook columns.

To import a file into the PhoneBook

1. Switch to the PhoneBook.

2. From the File menu, choose Database, then choose Import.

   The File Import dialog box appears.

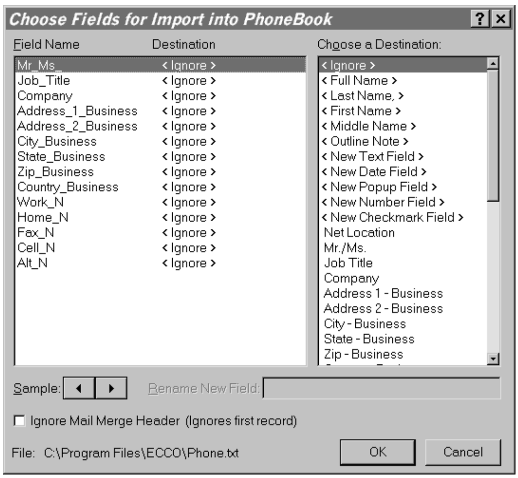


3. In the List Files Of Type box, select the file type you want to import.

4. In the File Name box, type or select the name of the file you want to import.

5. Choose the OK button.

   The Choose Fields For Import Into PhoneBook dialog box appears, which displays the field names located in the file you want to import. Use this dialog box to select the fields you want to import into the ECCO PhoneBook.



6. In the Field Name box, select a field you want to import into the ECCO PhoneBook.

7. In the Choose A Destination box, select a destination for the field:

   - If you do not want to import the information in the selected field, select <Ignore>.

- If you want the information in the selected field to appear as part of the item for this PhoneBook name, select Full Name, Last Name, First Name, or Middle Name.

Note: Use First Name and Last Name if the source file has separate fields for the first and last names. Use Full Name if the names are in a single field. Use Name As Entered if the source file is an ECCO file.

- If you want information in the selected field to appear as a particular field in the PhoneBook form, or if you want the information in the selected field to appear in an existing PhoneBook column or in another existing ECCO text column, select a field name without angle brackets.
- If you want to create a new column in the PhoneBook to import the selected import field to, select a field name with angle brackets and, then type a name in the Rename New Field box. For example, to create a new text column, select <New Text Field> and then type a name for the text field in the box.

8. Repeat steps 7 and 8 for each additional field you want to import.
9. To check your field mapping, click the Sample buttons to move through the file one record at a time.
10. When you have specified a destination for each field you want to import, choose OK.

    ECCO imports the information in the view to the file you specified.

Importing to a Notepad

You can import both item text and column information into a Notepad. ECCO lets you specify which columns in the view you want to import to. If the file you are importing has a mail-merge header (if the first row of the file contains field names), you can use the header to create new columns to import to. If the file does not have a mail-merge header and if you'd like to import information into columns, choose the fields you want to import and the columns you want to import them to.

Note: Although you can't import directly into the Calendar, you *can* import date column information into an ECCO Notepad. And, by default, any information you import into a date column will appear in the Calendar. Be sure to insert the date folders (usually all the folders under scheduling in the Folder window) into the Notepad before importing.

To import a file into a Notepad

1. Switch to a Notepad.
2. From the File menu, choose Database, then choose Import.

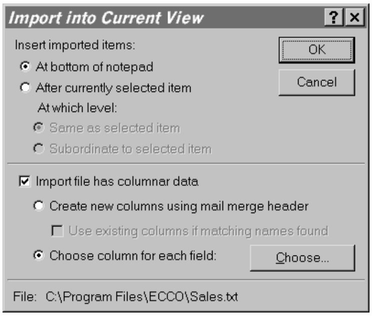
   The File Import dialog box appears.

3. In the List Files of Type list box, select the file type you want to import.

4. In the File Name box, type or select the file you want to import.

5. Choose the OK button.

   The Import into Current View dialog box appears.



6. Under Insert Imported Items, select an option:

   - To place the imported information at the bottom of the outline, select the At Bottom of Outline option.
   - To place the imported information after and at the same level as the currently selected item first select the After Currently Selected Item option, and then select the Same As Selected Item option.
   - To place the imported information after and subordinate to the currently selected item, first select the After Currently Selected Item option, and then select the Subordinate to Selected Item option.

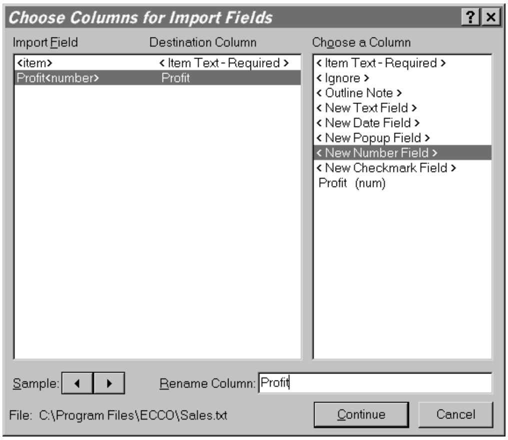
7. If you are importing information into columns, select the Import File Has Columnar Data option.

8. If the file you are importing has a mail-merge header that you want to use to create new columns, select the Create New Columns Using Mail Merge Header option.

   If you want to use existing ECCO columns if they match the fields in the file, select the Use Existing Columns If Matching Names Found option.

9. To choose the columns you want to import to, select the Choose Column For Each Field option, and then choose the Choose button.

   The Choose Columns For Import Fields dialog box appears, which displays the field names in the file you want to import. Use this dialog box to select the fields you want to import into the ECCO Notepad.



10. In the Import Field list, select an import field you want to import into the ECCO Notepad.

11. In the Choose a Column box, select a destination for the import field (the first import field is automatically designated as item text).

    - If you do not want to import the information in the selected import field, select Ignore.
    - If you want the information in the selected import field to appear in a particular column in the Notepad, select that column.
    - If you want to create a new column in the Notepad to import the selected import field to, select a column type with angle brackets and then type a name in the Rename Column box. For example, to create a new text column, select <New Text Field> and then type a name for the text field in the box. For more information about column types, see chapter or online help, “Columns and Values.”

12. Repeat steps 11 and 12 for each additional field you want to import.

13. To check your field mapping, click the Sample buttons to move through the file one record at a time.

14. When you have specified a destination for each field you want to import, choose the Continue button.

15. Choose the OK button.

    ECCO imports the information into the Notepad.

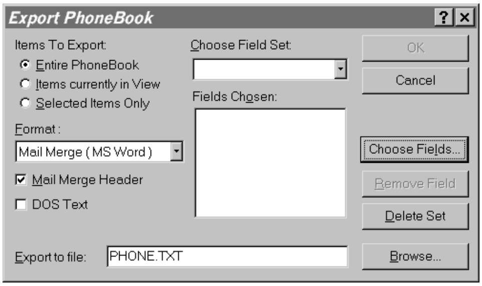
Exporting from the PhoneBook

Use the Export command on the File menu to export PhoneBook entries to another program. For example, you might export your PhoneBook to a database, or you might export PhoneBook entries to a mail-merge file for a word-processing program and use the program's mail-merge feature to print form letters.

To export from the PhoneBook

1. Switch to the PhoneBook.
2. From the File menu, choose Database, then choose Export.

   The Export PhoneBook dialog box appears.



3. Under Items To Export, select an option:
   - To export all entries in your PhoneBook, select the Entire PhoneBook option.
   - To export only those entries collected in the PhoneBook list, select the Items Currently In View option.
   - To export only selected items, select the Selected Items Only option.
4. Select one of the format options:
   - To export information to a word-processing program in a mail-merge format, select one of the mail-merge options.
   - To export the PhoneBook to a spreadsheet or database, select the CSV (Comma Separated) format.
   - To export only names and outline notes to a word-processing program, select the Outline Only (Tab Indented) format.
   - To export names, column information, and outline notes, select CSV (+ Tab Indented Notes).
   - To export to another ECCO file, select the ECCO to ECCO format.

Note: Check the DOS Text option if you want to restrict the export file to ASCII characters.

5. If you are doing a mail merge or if you plan to import your PhoneBook information back into ECCO at a later time, select the Mail Merge Header option (if it is not already selected).

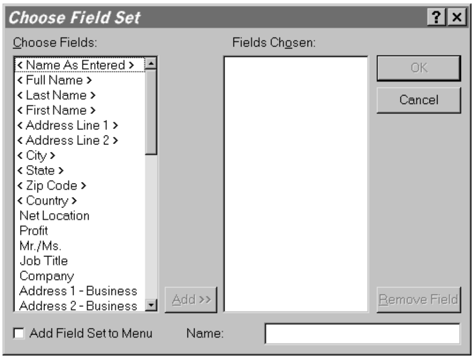
6. In the Export to File box, type a name for the file you want to export.

   Or

   Choose the Browse button and then select a file to export to (*.TXT or *.CSV). The file will be overwritten.

7. Choose the Choose Fields button.

   The Choose Field Set dialog box appears. Use this dialog box to select the PhoneBook fields you want to export.



8. In the Choose Fields list, select a field you want to export.

Note: The < > fields are the default fields chosen in ECCO. For example, if home address is the default for an entry, that default information would be used for the export. If you are uncertain, ignore the < > fields and include the Address - Business and Address - Home fields in the export.

9. Choose the Add button.

   The field appears in the Fields Chosen list.

10. Repeat steps 8 and 9 for each additional field you want to export.

11. When you have finished specifying fields, choose the OK button.

12. Choose the OK button.

   The PhoneBook is exported to the file you specified.

Note: To add the field set to the menu, in the Choose Field Set dialog box, select the Add Field Set to Menu option, and then type a name in the Name box. The field set will appear under Choose Field Set in the Export PhoneBook dialog box.

Exporting from a Notepad

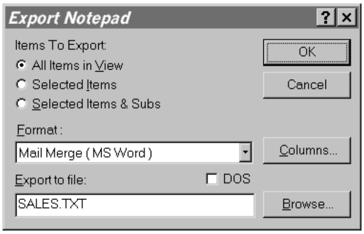
When exporting from a Notepad, you can export all items in the view, selected items, or items plus information in columns.

To export from a Notepad

1. Switch to the Notepad you want to export.

2. From the File menu, choose Database, then choose Export.

   The Export Notepad dialog box appears.



3. Under Items To Export, select an option:

   - To export all items in your Notepad, select the All Items In View option.
   - To export selected items, select the Selected Items option.
   - To export selected items plus their subitems, select the Selected Items & Subs option.

4. Select one of the format options:

   - To do a mail merge, select one of the mail-merge options.
   - To export the Notepad (including information in columns) to a spreadsheet or database, select the CSV (Comma Separated) format.
   - To export only outline items to a word-processing program, select the Outline Only (Tab Indented) format.
   - To export to another ECCO file, select the ECCO To ECCO format.

Note: Check the DOS Text option if you want to restrict the export file to ASCII characters.

5. In the Export To File box, type a name for the file you want to export.

   Or

   Choose the Browse button and select a file to export to (*.TXT or *.CSV). The file will be overwritten.

6. Choose the OK button to export your outline.

Or

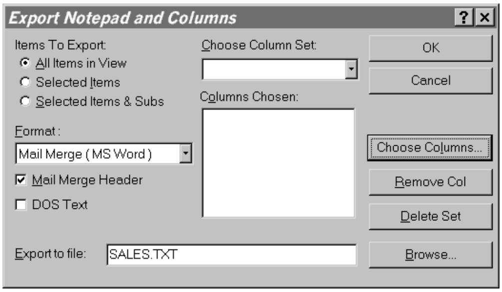
To export information in columns, follow the instructions described in the following procedure.

To export a Notepad with columns

Before beginning this procedure, follow the steps described in the preceding procedure.

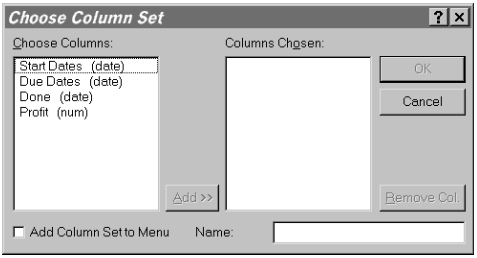
1. In the Export Notepad dialog box, choose the Columns button.

   The Export Notepad and Columns dialog box appears.



2. Choose the Choose Columns button.

   The Choose Column Set dialog box appears. Use this dialog box to choose the columns you want to export.



3. In the Choose Columns list, select one or more columns you want to export.
4. Choose the Add button.

   The column(s) appear in the Columns Chosen list.

5. Repeat steps 3 and 4 for any additional columns you want to export.
6. When you have finished selecting columns, choose the OK button.
7. Choose OK again.

   The Confirm Export dialog box appears.

8. Choose OK to confirm the export.

Or

Choose Cancel to cancel the export.

If you chose OK, the Notepad is exported to the file you specified.

Note: To add the column set to the menu, in the Choose Column Set dialog box, select the Add Column Set to Menu option, and then type a name in the Name box. The column set name appears under Choose Column Set in the Export Outline and Columns dialog box.

Exporting from the Calendar View

To export Calendar information, place the Appointments folder or a date folder into a Notepad, and then export the Notepad and its columns.

For more information about placing folders in Notepads, see the chapter or online help, “Folders.”

Follow the instructions for exporting from a Notepad earlier in this chapter.

Combining ECCO Files

If you need to combine multiple ECCO files, simply export the information from one or more ECCO files and then import it into the destination ECCO file.

Combining ECCO Notepads

To combine two files, you can transfer data from one ECCO file to another using the Search Results notepad:

- Collect in the Search Results notepad of the first file all the data you want to transfer.
- Add any columns you want to export to the Search Results notepad.
- Export the Search Results notepad to a text file.
- Import the text file into the Search Results notepad of the destination file.

Use the following procedure to collect all data you want to export in the Search Results notepad. This procedure can be used with any named filter.

To collect all data in the Search Results notepad

1. Open the ECCO file from which you want to transfer data.
2. From the Edit menu, choose Find.

   The Find dialog box appears.

3. To display the entire Find dialog box, click the Unfold button (>>).
4. In the Find box, select and delete any text.
5. Under Scope, select the Entire File option.
6. In the Find Items Matching Filter box, select None or choose any named filter in the list.
7. Under Actions, select the Copy To "Search Results" View option, and then select Replace.
8. Choose Collect All. ECCO places a copy of all items in your ECCO file in the Search Results notepad.
9. Close the Find dialog box.

To add columns to the Search Results notepad

If you want to export item values, you must add columns for all folders that contains items before you export.

1. From the Column menu, choose Show Columns.
2. From the Column menu, choose Insert Column, and then choose Existing Folder.

   The Insert Folder Columns dialog box is displayed.
3. Select all the columns whose values you want to export. For more information about columns and values, see the chapter or online help on "Columns and Values." You can insert a maximum of 100 folders.
4. Choose the OK button.

To export from the Search Results notepad

1. From the File menu, choose Database, then choose Export.

   The Export Notepad dialog box appears.
2. In the Export Notepad dialog box, choose the Columns button.

   The Export Notepad And Columns dialog box appears.
3. Under Items To Export, select All Items In View.
4. Under Format, select ECCO To ECCO.
5. Select the Mail Merge Header option, if it is not already selected.
6. Select the DOS Text option, if it is not already selected.
7. Choose the Choose Columns button.

The Choose Column Set dialog box appears.

8. Select all the columns in the Choose Columns list.
9. Choose the Add button.

   The column(s) appear in the Columns Chosen list.

10. Choose the OK button.
11. Choose OK again.

    The Confirm Export dialog box appears.

12. Choose OK to confirm the export.

    The Notepad is exported to the file NOTEPAD.TXT.

To import a file into the Search Results notepad

Now that you have exported the data from your first file, you can import it into the Search Results notepad of a new or existing ECCO file.

1. Open the ECCO file into which you want to transfer data.
2. Again, use the Find dialog box to collect everything in the file and display the Search Results notepad.
3. From the File menu, choose Database, then Import.

   The File Import dialog box appears.

4. In the File Name box, select NOTEPAD.TXT. This is the file into which you exported data in the previous procedure.
5. Choose the OK button.

   The Import Into Current View dialog box appears.

6. Select the Import File Has Columnar Data option.
7. Select the Create New Columns Using Mail Merge Header option.
8. Select the Use Existing Columns If Matching Names Found option.
9. Choose the OK button.

   The Confirm Import dialog box appears.

10. Choose the OK button.

    ECCO imports the data into the Search Results notepad.

Combining ECCO PhoneBooks

To combine two ECCO PhoneBooks, you export the PhoneBook of the first ECCO file to a text file and then import that text file into the PhoneBook of the second file.

To export from the PhoneBook

1. Switch to the PhoneBook.
2. From the File menu, choose Database, then choose Export.

   The Export PhoneBook dialog box appears.
3. Under Items To Export, select the Entire PhoneBook option.
4. Under Format, select the ECCO to ECCO format.
5. Select the Mail Merge Header option, if it is not already selected.
6. Clear the DOS Text option unless you want to restrict the export file to ASCII characters.
7. Choose the Choose Fields button.

   The Choose Field Set dialog box appears.
8. In the Choose Fields list, select Name As Entered.
9. Choose the Add button.

   The field appears in the Fields Chosen list.
10. In the Choose Fields list, select all fields from “Mr./Ms.” to the end of the list, skipping fields surround by angle brackets (< >).
11. Choose the Add button.

    The fields all appear in the Fields Chosen list.
12. Choose the OK button.
13. In the Export PhoneBook dialog, choose the OK button.

    The PhoneBook is exported to the file PHONE.TXT.

To import a file into the PhoneBook

1. Switch to the PhoneBook of the file into which you want to import.
2. From the File menu, choose Database, then Import.

   The File Import dialog box appears.
3. In the File Name box, select PHONE.TXT.

This is the file into which you exported PhoneBook data in the previous procedure.

4. Choose the OK button.

   The Choose Fields For Import Into PhoneBook dialog box appears, which displays the field names located in the file you want to import. You use this dialog box to select the fields you want to import into the ECCO PhoneBook.

5. In the Field Name box, select Name As Entered.

6. In the Choose a Destination box, select Full Name.

   The Name As Entered field is mapped to the Full Name field. Now you must map the remainder of the fields you want to import.

7. In the Field Name box, select a field you want to import into the ECCO PhoneBook.

8. In the Choose a Destination box, select a destination for the field:

   - If you do not want to import the information in the selected field, select Ignore.
   - If you want the information in the selected field to appear as a particular field in the PhoneBook form, or if you want the information in the selected field to appear in an existing PhoneBook column or in another existing ECCO text column, select a field name without angle brackets.
   - If you want to create a new column in the PhoneBook to import the selected import field to, select a field name with angle brackets, and then type a name in the Rename New Field box. For example, to create a new text column, select <New Text Field>, and then type a name for the text field in the box.

9. Repeat steps 7 and 8 for each additional field you want to import.

10. When you have specified a destination for each field you want to import, choose OK.

    ECCO imports the information in the file to the destinations you specified.

Archiving Appointments and Ticklers

Over time, many appointments and tickler items can accumulate in your ECCO file. *Archiving* allows you to store appointment and tickler items so that you can

- Pass the information on to others.
- Create a library of your past activities either for security or future reference.
- Reduce the size of your ECCO file by removing old appointments and tasks.

To archive old appointments and ticklers

1. Open the file you want to archive information from.

2. From the File menu, choose Database, then choose Archive.

The Archive Appointments And Ticklers dialog box appears.

3. In the Archive Items Before field, select a cut-off date before which items will be archived.

4. In the To File box, enter a filename for the archived information or accept the default filename.

   The default filename is based on the current date. For example, if you are archiving information on April 25, 1997, the default filename would be 042597.ECO.

5. To remove the archived information from the active file, select the Delete After Archiving option.

   Recurring events are not deleted if their final recursion date falls after the archive date.

6. Choose OK to finish archiving.

Note: Each time you archive information, ECCO saves the information to a new ECCO file. You cannot add the information to an existing file.

Exporting Data to a Timex® Data Link™ Watch

ECCO allows you to export data to the Timex Data Link watch. This is an export-only feature. The Timex Data Link watch is a receive-only device.

Note: To transfer data you must use a CRT (cathode ray tube) monitor or the Data Link adapter. The Data Link software will not work with laptop or any LCD screen display.

To select PhoneBook items to transmit

ECCO uses a checkmark column called "Timex" to select PhoneBook items to be transmitted to the Data Link watch. You can use a different name by specifying it in the ECCO Timex Data Link Options dialog box, described later.

1. Create and add the column "Timex" in the PhoneBook view. For more information on adding a column, see the chapter or online help on "Columns and Values."

   Or

2. Select the Timex Data Link command from the Tools menu. Choosing the OK button on the selection of information to transmit dialog box will prompt you to create the Timex column. Choose the Yes button.

   This creates the Timex folder and adds it as a column to the PhoneBook view.

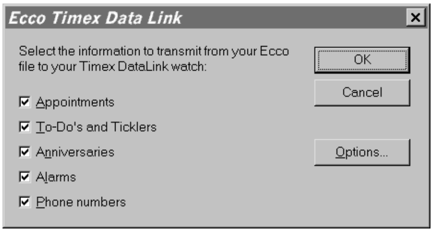
3. Close the Times Data Link dialog box and switch to the PhoneBook view.

4. Place a checkmark in the Timex column for each PhoneBook item to be exported.

To export from ECCO

1. Choose the Timex Data Link command from the Tools menu.

   The ECCO Timex Data Link dialog box appears.

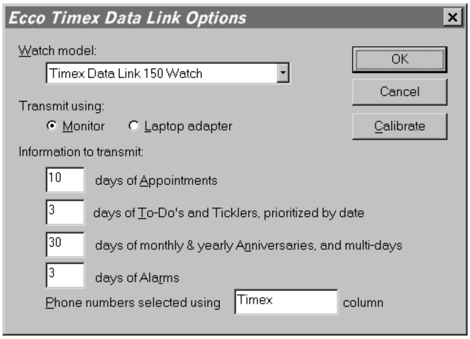


2. Select the type of items you want to transmit. You can select one or any combination of the following:

   - Appointments
   - To-Do's and Ticklers
   - Anniversaries
   - Alarms
   - Phone numbers

3. Choose the Options button.

   The ECCO Timex Data Link Options dialog box appears.



4. Select the watch model from the list box.

5. Select the type of transmission—monitor or laptop adapter.

Note: The first time you run the Timex Data Link export, or when you change the Watch model or Transmit using option, the ECCO Timex Link Calibrate dialog box will appear. It is also recommended that anytime you make changes to your monitor that you choose the Calibrate button.

6. Enter the number of days of appointments, to-do's and ticklers, anniversaries, and alarms data to transmit. The maximum setting is 30 days.

7. Enter the checkmark column name that you have used to select the ECCO PhoneBook items to be transmitted. The default is Timex.

8. Choose the OK button.

   The ECCO Timex Data Link dialog box appears.

9. Choose the OK button.

   The Preparing to Transit dialog box appears.

10. Choose the OK button.

11. Hold the watch in front of the screen until the receive completion tone sounds.

For more information on using the watch, see the Timex Data Link User's Guide provided with your Timex Data Link watch.

Using ECCO with the U.S. Robotics® Pilot™ PDA

Note: This feature is available only in the 32-bit version of ECCO Pro. The Pilot HotSync Options command on the Tools menu is displayed, but disabled, in the 16-bit version of ECCO Pro.

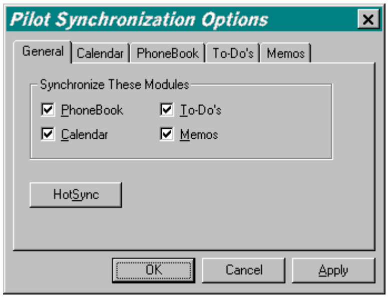
With ECCO you can synchronize your PhoneBook, to-do's, appointments, and selected notes with your Pilot PDA.

Step-by-step instructions are provided in this document for a variety of scenarios while using ECCO with your Pilot. It is highly recommended that you read through the document to become familiar with the Pilot synchronization process, any limitations that may pertain to your situation, and to learn about the options available for data synchronization.

Setting Pilot synchronization options

1. From the Tools menu in ECCO, select Pilot HotSync Options.

   The Pilot Synchronization Options dialog box appears and contains the following fields:



General

Field	Meaning
PhoneBook	Synchronize data in ECCO's PhoneBook and Pilot's Address Book.
Calendar	Synchronize data in ECCO's Calendar and Pilot's Date Book.
To-Do's	Synchronize data in ECCO's To-Do's section and Pilot's To Do List.
Memos	Synchronize data in ECCO's Notepads and Pilot's Memo Pad.
HotSync button	Launches Pilot HotSync Manager or maximizes if minimized.

Calendar, PhoneBook, To-Do's, and Memos

Field	Meaning
No Subs	Do not synchronize subitems for the selected module.
Delete As Archive	Any data deleted on the Pilot should be assigned to ECCO's archive folder.
Normal Sync	Synchronize data that is new or has been modified for the selected module.
Full Sync	Synchronize all data regardless of status for the selected module.
Clear Pilot Data First	Erase the data in the selected Pilot module before resending ECCO data.

Note: The Memos tab does not have an option for No Subs.

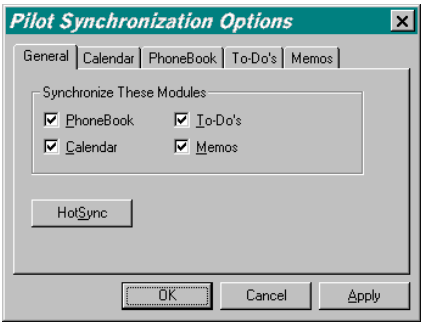
Synchronizing your data for the first time

Transferring your data between ECCO and the Pilot is as easy as pressing the HotSync button.

Note: If you have previously used the Pilot Desktop you should synchronize so the Pilot contains the most recent data. Once you begin using ECCO with the Pilot, do not continue use of the Pilot Desktop. Using the Pilot Desktop in combination with ECCO may result in irrecoverable data loss.

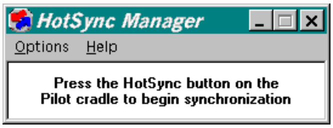
1. From the Tools menu in ECCO, select Pilot HotSync Options.

   The Pilot Synchronization Options dialog box appears.



1. Choose the HotSync button.

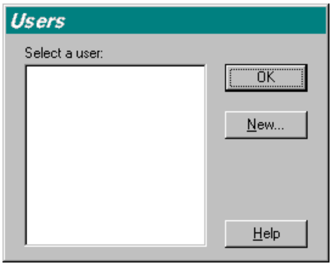
   The Hot Sync Manager window appears.



Note: Choosing the HotSync button launches the HotSync Manager. If the HotSync Manager is already running or minimized the window is maximized and brought to the forefront.

1. With the Pilot in its transfer cradle, press the HotSync button.

   The Users dialog box appears.



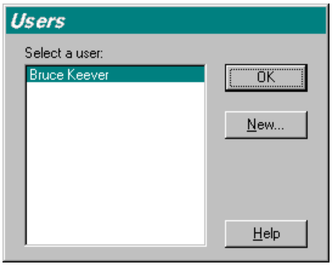
Note: These steps assume that you are using a Pilot that has been hard reset or never synchronized with any other program. If you have synchronized with the Pilot, you will not see the Users dialog box, the The HotSync Progress dialog box appears followed by the Choose ECCO File to Synchronize with Pilot dialog box. You may proceed to step 7.

1. Choose the New button.

   The New user dialog box appears.

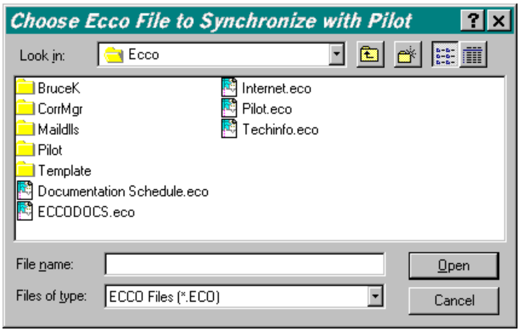
1. Type a new user name and choose the OK button.

   The Users dialog box is displayed with the name you just entered.



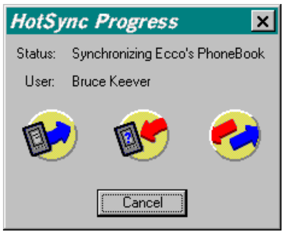
1. Be sure the correct user name is selected if more than one name appears and choose the OK button.

This user name is sent to and recorded in the Pilot. The HotSync Progress dialog box appears followed by the Choose ECCO File to Synchronize with Pilot dialog box.



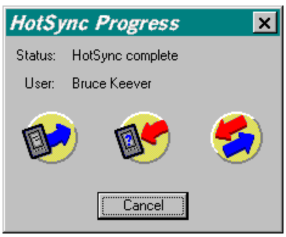
1. Navigate to the correct folder and highlight the ECCO file you want to synchronize with the Pilot.

2. Choose the Open button.



The HotSync Progress dialog box appears as ECCO transfers data to the Pilot.

The HotSync Progress dialog box will display a Status of HotSync Complete and the Pilot will display “Hot Sync Complete” at the completion of the data transfer.



Synchronizing your data after the first time

Note: Once you begin using ECCO with the Pilot, do not continue use of the Pilot Desktop. Using the Pilot Desktop in combination with ECCO may result in irrecoverable data loss.

1. With the Pilot in its transfer cradle, press the HotSync button.

The HotSync Progress dialog box appears as ECCO and the Pilot synchronize data. The Pilot will display “Hot Sync Complete” at the completion of the data transfer.

You will not have to select the ECCO file again. Data is synchronized between the Pilot and ECCO.

Note: If the ECCO file on your computer is moved or deleted, you will be prompted with the Choose ECCO File to Synchronize with Pilot dialog box. Navigate to the correct folder and highlight the ECCO file. Choose the Open button.

Synchronizing selected modules only

ECCO gives you the ability to select which of the four modules to synchronize during a HotSync.

1. From the Tools menu in ECCO, select Pilot HotSync Options.

   The Pilot Synchronization Options dialog box appears.

2. On the General tab check each module to be synchronized.

   You can select any combination, including all modules, to synchronize.

3. Select the General tab.

4. Choose the HotSync button.

   The Hot Sync Manager window appears.

5. With the Pilot in its transfer cradle, press the HotSync button.

   The HotSync Progress dialog box appears as ECCO and the Pilot synchronize data. The Pilot will display “Hot Sync Complete” at the completion of the data transfer.

Restoring data on the Pilot and in ECCO

Situations may arise where you want to synchronize with a new ECCO file. You may also want to delete some or all of the data in the Pilot. The following three sections will guide you through the procedures to:

- Synchronizing Pilot data into a different ECCO file
- Synchronizing part or all of your ECCO data into the Pilot
- Synchronizing ECCO data with a completely erased (hard reset) Pilot

Synchronizing Pilot data into a different ECCO file

If you want to begin synchronizing with a different ECCO file and export the data from your Pilot to this new file, do the following steps. This assumes that you want to discard the entire contents of your ECCO file.

Note: If you do not want to discard the data in the ECCO file you are currently synchronizing with, rename the ECCO file before proceeding. You will no longer be able to synchronize this file with the Pilot after you rename the file.

1. Create a new ECCO file and save it with the **same filename** in the **same location** as the previous ECCO file you were synchronizing with.

   Note: You can also open an existing ECCO file that contains data, but you will need to save the file (File, Save As) as the **same filename** and in the **same location** as the ECCO file you are currently synchronizing with.

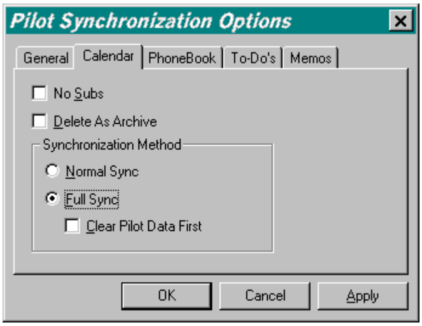
   The Pilot was programmed during the original synchronization to look for this ECCO filename in the specified location on the hard drive.

2. From the Tools menu in ECCO, select Pilot HotSync Options.

   The Pilot Synchronization Options dialog box appears.

3. On the General tab check each module to be synchronized.

4. Switch to each Module tab (Calendar, PhoneBook, To-Do's, and Memo) and select Full Sync for the Synchronization Method.



1. Choose the OK button.

   Selecting the Full Sync option sends all data in the Pilot to the new ECCO file.

2. Place the Pilot in the HotSync cradle and press the HotSync button on the cradle.

3. In ECCO from the Tools menu select Pilot HotSync Options.

   The Pilot Synchronization Options dialog box appears.

4. Switch to each Module tab (Calendar, PhoneBook, To-Do's, and Memo) and select Normal Sync for the Synchronization Method.

5. Choose the OK button.

6. Save the ECCO file.

   The ECCO file and the Pilot are now synchronized.

Synchronizing part or all of your ECCO data into the Pilot

The occasion may arise where you want to refresh (erase) the data in some or all of the modules of the Pilot. By doing these steps you can have all of the existing data in the selected modules on the Pilot cleared before the data transfer from ECCO begins.

1. Open the ECCO file you have synchronized with the Pilot.
2. From the Tools menu in ECCO, select Pilot HotSync Options.

   The Pilot Synchronization Options dialog box appears.
3. Check the modules that you want to clear and reload from ECCO.
4. Click on the tab of each module you checked on the General tab.
5. Select the Full Sync option in the Synchronization Method section.
6. Check the Clear Pilot Data First option.
7. Repeat steps 4 - 6 for each module checked on the General tab.
8. Choose the Apply button.
9. Click on the General tab.
10. Choose the HotSync button.

    Note: Choosing the HotSync button launches the HotSync Manager. If the HotSync Manager is already running or minimized the window is maximized and brought to the forefront.
11. With the Pilot in its transfer cradle, press the HotSync button.

    The HotSync Progress dialog box appears as ECCO and the Pilot synchronize data. The Pilot will display “Hot Sync Complete” at the completion of the data transfer.

    For each module you chose to Clear Pilot Data First, the Pilot data was cleared then synchronized with the data in ECCO.

Synchronizing ECCO data with a completely erased (hard reset) Pilot

If you want to completely erase the data in your Pilot and synchronize with ECCO (either a new file or reload an existing ECCO file) into a blank Pilot, do the following steps.

1. Press and hold the green power button in on the Pilot, then insert a paper clip or similar object in the reset hole on the back of the Pilot. Remove the paper clip, then release the green power button.

   The message Erase All Data? appears.
2. Press the up button on the Pilot to confirm the data erasure.

Note: This method **erases all data in the Pilot**, **including any add-on applications** (.PRC files) you have uploaded into the Pilot.

If you did not see the Erase All Data? prompt, the reset was not successful. You must see this message and respond Yes to properly reset the Pilot.

For additional resetting information, see the Pilot User's Guide that came with your Pilot.

3. Create and save an ECCO file or open an existing ECCO file.
4. From the Tools menu, select Pilot HotSync Options.

   The Pilot Synchronization Options dialog box appears.
5. On the General tab be sure all four modules are checked.
6. Switch to each Module tab (Calendar, PhoneBook, To-Do's, and Memo) and select Full Sync for the Synchronization Method.
7. Choose the OK button.

   Selecting the Full Sync option sends all data in the ECCO file to the Pilot.
8. With the Pilot in its transfer cradle, press the HotSync button.

   The Users dialog box appears.

   Note: To remove user name list from the Users dialog box delete the USERS.DAT file located in the \ECCO\PILOT folder on the hard drive.
9. Choose the New button.

   The New user dialog box appears.
10. Type a new user name and choose the OK button.

    This user name is sent to the Pilot. The HotSync Progress dialog box appears followed by the Choose ECCO File to Synchronize with Pilot dialog box.
11. Navigate to the correct folder and highlight the ECCO file.
12. Choose the Open button.

    The HotSync Progress dialog box appears as ECCO transfers data to the Pilot. The Pilot will display "Hot Sync Complete" at the completion of the data transfer.
13. In ECCO from the Tools menu select Pilot HotSync Options.

    The Pilot Synchronization Options dialog box appears.
14. Switch to each Module tab (Calendar, PhoneBook, To-Do's, and Memo) and select Normal Sync for the Synchronization Method.

Note: If you forget to change the Synchronization Method back to Normal Sync do not worry. Synchronization will take longer as all items are being transferred, but data integrity will be maintained.

15. Save the ECCO file.

    The Pilot now contains a synchronized copy of the data that is in the ECCO file.

Special Notes

ECCO allows for very powerful, flexible customization to items in your file. The Pilot synchronization feature does have some limitations. You should carefully read this section **before** you begin using ECCO with the Pilot.

Calendar Module

Excluding older Appointments from synchronization

By default, all calendar items are synchronized with the Pilot. Most likely, there are older items that you do not want to send to your Pilot.

To exclude these items, you can do the following in your ECCO file:

1. From the View menu, select Notepads, then New Notepad.

   The Create Notepad dialog box appears.

2. Choose the Options button.

   The Create Notepad Options dialog box appears.

3. Select Display The Items From Existing Folders In This Notepad.

4. Beneath Click On A Folder To Add To Notepad scroll to the Appointments folder which is a subfolder of Scheduling. If a + symbol appears to the left of the Scheduling folder, click with the left mouse button on the + symbol to expand the subfolders.

5. Click on the Appointments folder.

   A checkmark will appear to the left of the folder and the folder name will appear beneath Folders In Notepad.

6. Choose the OK button.

   The Create Notepads dialog box appears.

7. Choose the OK button.

   A Notepad view containing items in the Appointments folder appears.

8. From the Tools menu, select Sort View.

9. Select Entire View, Appointments in the listbox, and Ascending for Sort Key 1.
10. Choose the OK button.
11. From the Column menu, select Insert Column, Existing Column or Folder.
12. Scroll until you see Pilot Archive (check).
13. Click on Pilot Archive (check) to highlight the folder.
14. Choose the OK button.

    The Pilot Archive folder becomes a column in the Notepad.
15. Click in the Pilot Archive column to add a checkmark beside each Appointment item you do not want to synchronize with the Pilot.

    When you synchronize, Appointments with the Pilot Archive column checked will not be sent to the Pilot.

Date folders

ECCO transfers items only from the Appointments section. Other date folders are not transferred. You can transfer items dated between January 1, 1970 and December 31, 2031.

Certain item recurrences cannot be transferred to the Pilot. These include items recurring more than one day in a month or year, recurring the fifth week of a month, or recurrences designed for the first or last business day of the month.

Recurring items

All recurrences will have notes attached unless they are exceptions. An exception could be an item that was moved to a new time or date in ECCO. The Pilot will create this item as in independent item, while ECCO still maintains the link to the other recurring items. If you then change the item on the Pilot, a new separate item will be introduced in ECCO and the link to the other ECCO recurring items will be lost.

ECCO versus Pilot alarm settings

ECCO has 24 alarm settings. The Pilot contains addition settings. To avoid possible duplication of items, when assigning an alarm to an item in Pilot use a an alarm setting that is available in ECCO. If an alarm setting is chosen on the Pilot that is not available in ECCO, the alarm will be associated with the closest setting available. The 24 alarm settings in ECCO are as follows:

- 5, 10, 15, 30, 45, or 90 minutes
- 1, 2, 3, 4, 5, or 6 hours, days, or weeks

Multiple alarms

If you have multiple alarms associated with an event, for example a reminder five, four, and three days before an event, only the alarm nearest the event will be transferred. This is a limitation of the Pilot. You should note that modifying the item in the Pilot will have consequences when the item is synched with the ECCO file. Changes made to the multiple alarm attribute item in Pilot will cause the loss of special alarm attributes in ECCO, such as playing a sound file or launching an application. In addition, the multiple alarms will be reduced to just the one alarm closest to the event.

PhoneBook Module

Special Pilot Address Book fields

There are several fields in the Pilot that are not in ECCO. These include the Address Book category, pager number, main number, and custom fields 1 - 4. These fields will be added to the ECCO file.

The Pilot uses one address per Address Book entry. The address transferred to the Pilot is determined by the ECCO “Address to use when printing” option on the New PhoneBook name form. You can also select PhoneBook item(s) and choose Address Printing from the PhoneBook menu to designate this preference.

First name, last name order

The Pilot uses separate fields for Last Name and First name. ECCO uses one name field. As a result, this causes certain entries, such as single name entries or entries with punctuation like business names to exhibit special behaviors.

An example of a single name entry is as follows:

If you create a PhoneBook record in ECCO and input only the name “Floyd” in the Name (Last, First) field the name Floyd will appear in the Pilot with Floyd in the Last Name field.

If you create an Address Book entry on the Pilot and enter a name only in the First name field, the name will appear in the Name (Last, First) field in ECCO when synchronized. Upon the second synchronization, the Pilot record will be modified to display the name “Floyd” in the Last Name field.

All single name entries in ECCO will ultimately appear in the Last name field of the Pilot.

Address 1 and Address 2 field in ECCO

Using the “Address 1” and “Address 2” fields in ECCO will transfer the information to the first two lines of the Pilot Address field.

To-Do Module

Note: In the ECCO Tickler section only items in the To-Do's folder are synchronized. Items in any other folder displayed in the Tickler section are **not** transferred.

Excluding older To-Do's from synchronization

By default, all To-do's are synchronized with the Pilot. Most likely, there are older items that you do not want to send to your Pilot.

To exclude these items, you can do the following in your ECCO file:

1. From the View menu, select Notepads, then New Notepad.

   The Create Notepad dialog box appears.

2. Choose the Options button.

   The Create Notepad Options dialog box appears.

3. Select Display The Items From Existing Folders In This Notepad.

4. Beneath Click On A Folder To Add To Notepad scroll to the To-Do's folder which is a subfolder of Scheduling. If a + symbol appears to the left of the Scheduling folder, click with the left mouse button on the + symbol to expand the subfolders.

5. Click on the To-Do's folder.

   A checkmark will appear to the left of the folder and the folder name will appear beneath Folders In Notepad.

6. Choose the OK button.

   The Create Notepads dialog box appears.

7. Choose the OK button.

   A Notepad view containing items in the To-Do's folder appears.

8. From the Tools menu, select Sort View.

9. Select Entire View, To-Do's in the listbox, and Ascending for Sort Key 1.

10. Choose the OK button.

11. From the Column menu, select Insert Column, Existing Column or Folder.

12. Scroll until you see Pilot Archive (check).

13. Click on Pilot Archive (check) to highlight the folder.

14. Choose the OK button.

    The Pilot Archive folder becomes a column in the Notepad.

15. Click in the Pilot Archive column to add a checkmark beside each item you do not want to synchronize with the Pilot.

    When you synchronize, items with the Pilot Archive column checked will not be sent to the Pilot.

To-Do dates

ECCO assigns all To-Do's a date. The Pilot does not automatically assign dates to To-Do's. During synchronization ECCO will use the current date of the synchronization as the date for To-Do's created in the Pilot. If you move or modify the date on the Pilot-created To-Do in ECCO, the date assigned to the To-Do during synchronization will be sent back to the Pilot and the Pilot's blank To-Do date will now contain the date that appears in ECCO.

In order for To-Do's to be displayed in ECCO on other day views besides the synchronization date, you may have to modify the properties of the To-Do's folder in ECCO.

1. From the Calendar menu in ECCO, select Options.

   The Calendar Options dialog box appears.

2. Select the Ticklers tab.

3. Choose the Tickler Item Options button.

   The Choose Tickler Type dialog box appears.

4. Select To-Do's and choose the OK button.

   The Date Properties dialog box appears.

5. Select Until Marked Done from the Carry Forward listbox.

6. Choose the OK button to save and close the Date Properties dialog box.

7. Choose the OK button to close the Calendar Options dialog box.

   Now any To-Do item entered in the Pilot will appear in ECCO from the date of synchronization until the item is marked done.

Items from the To-Do's folder are synchronized with the Pilot. If you want a ticker item to be synchronized, it must be in the To-Do folder.

Two new folders are introduced in ECCO by the Pilot. These two folders are the "ToDo Category" and "Priority" number folder. The latter folder uses numbers one through five for priority coding.

Marking To-Do's "done"

When you mark an item completed in the Pilot, the "Done" date folder in ECCO will display the date you synchronize with your ECCO file.

Recurring To-Do's

Recurring To-Do's will display in the Pilot as the next due date after the last done date. This is identical to the behavior in ECCO.

Memo Module

Line spacing

A blank line will be inserted on the Pilot between items prefaced with a bullet in ECCO. Lines created by soft returns or pressing CTRL+ENTER in an ECCO outline will **not** be prefaced with a blank line.

For example, in ECCO you may have the following outline:

```
• Contact convention center
       • What dates are available?
       • What are the deposits?
• Make bank deposit
```

When synchronized, the information would appear in the Pilot as follows:

```
Contact convention center

What dates are available?
What are the deposits?

Make bank deposit
```

Likewise, to create items in the Pilot that will appear as bulleted top level items (TLIs) in ECCO a blank line must be left between each line in the Pilot Memo Pad.

Changing subnotes on the Pilot doesn't change ECCO subnotes

If you create a Memo on the Pilot and synchronize with ECCO, then modify the Memo on the Pilot, the item modified will remain unchanged in ECCO and a new item will be added that is identical to the changed Pilot item. Thus, an additional item now appears in ECCO.

For example, in the Pilot you create a Memo with three items:

```
Tom says he can code new product in three weeks

HR says we can only work Tom 90 hours per week

Product must ship in three weeks
```

When synchronized with ECCO the above memo appears as follows:

```
• Tom says he can code new product in three weeks
```

- `HR says we can only work Tom 90 hours per week`
- `Product must ship in three weeks`

If you now make a modification in the Pilot to one of the items, like the third item for this example, watch the effect in ECCO:

- `Tom says he can code new product in three weeks`
- `HR says we can only work Tom 90 hours per week`
- `Product must ship in four weeks`

Upon the next synchronization the following appears in ECCO:

- `Tom says he can code new product in three weeks`
- `HR says we can only work Tom 90 hours per week`
- `Product must ship in three weeks`
- `Product must ship in four weeks`

The original third item remains in ECCO and new fourth item appears.

Note: Changes made on the Pilot to a memo subnote will add new items to ECCO and don't delete the item that was modified on the Pilot.

A new popup folder called "Pilot Memos" will be created in your ECCO file. This field is used to designate items and their category that sync to pilot memos.

You can also insert the "Pilot Memos" folder as a column in any notepad new to designate items to send to the Pilot and the appropriate category.

It is important to note that the order of items within a memo pad is not synchronized.

For more information on exporting data to a U.S. Robotics Pilot PDA, see the TECHINFO.ECO file located in the folder where ECCO Pro was installed.

General Notes

Items exceeding 4 kilobytes (KB)

if an item in ECCO (the top level item and all of its subitems) exceeds 4 KB, then only the top level item (TLI) is synchronized with the Pilot. This is a size limitation of the Pilot.

When you attempt to synchronize an ECCO item that exceed the 4 KB limit, three actions occur.

- ECCO checks the Pilot No Notes column for the TLI
- ECCO transmits **only** the TLI to the Pilot
- A notation is made in the HOTSYNC.LOG file stores in the subfolder of the \ECCO\PILOT directory corresponding to the user's name. (i.e. \ECCO\PILOT\FLOYD)

Order of notes is not synchronized

It is important to understand that the order of notes are not synchronized from the Pilot to ECCO. Arranging subnotes in a specific order will not alter the order displayed within ECCO after synchronization. Changes made in ECCO will change the order on the Pilot.

Must synchronize Pilot with a local ECCO file

If you are using a shared ECCO file in a network environment, you can only synchronize the Pilot with a locally saved copy. If you open the ECCO file directly from the network (File, Open Shared) and do not maintain a local copy, you will be unable to synchronize this ECCO file with your Pilot. To do so, you must make a replica or local copy by choosing Save As from the ECCO file menu.

Don't check subitems for any ECCO/Pilot customization column

If you have one of the Pilot customization columns appearing in your view, it is important to only check top level items (TLIs). For example, if you have a PhoneBook entry that contains subnotes that you do not want to transfer to the Pilot, place a checkmark in the Pilot No Notes column adjacent to the PhoneBook item TLI. Placing a checkmark in the column adjacent to the subnotes can have adverse effects.

Other Pilot links stop working after synchronizing with ECCO

Verify that the other Pilot applications are compatible with HotSync Manager 1.1 (HSM11.EXE), which ECCO installs for use with the Pilot. The is the latest version and is required by ECCO. If other programs you are using with the Pilot stop working after you begin using ECCO with the Pilot, contact the manufacturer of the other application to verify they are compatible with version 1.1.

ECCO columns created for synchronization with the Pilot

- **Pilot Record ID (hidden):** This ID number is used to synchronize the ECCO item with the Pilot entry.

- **Pilot Archive:** When checked, the item is not synchronized with the Pilot.

- **Pilot No Notes:** When a top level item (TLI) has the column checked no subnotes are synchronized to the Pilot. This column is also automatically checked during the synchronization process if more than 4 KB of data is detected for one TLI, including subnotes.

- **Pilot Memos:** Items in ECCO with this column checked are sent to the Pilot as memos.

- **PhoneBook Category:** Items in ECCO with this column checked are sent to the Pilot as Address Book items.

- **Main #:** This is a Pilot field that is created as a folder in ECCO.

- **Pager #:** This is a Pilot field that is created as a folder in ECCO.

- **Display Phone (hidden):** Column used by synchronization process.

- **To Do Category:** This is a Pilot field that is created as pop-up list folder in ECCO.

- **Priority:** This is a Pilot field that is created an a numeric folder in ECCO.
- **PilotToDoDueDate (hidden):** Column used by synchronization process.
- **Custom 1:** This is a Pilot field that is created as a text folder in ECCO.
- **Custom 2:** This is a Pilot field that is created as a text folder in ECCO.
- **Custom 3:** This is a Pilot field that is created as a text folder in ECCO.
- **Custom 4:** This is a Pilot field that is created as a text folder in ECCO.

Chapter 10. Using ECCO with Other Programs

With ECCO you can create powerful connections to other programs and documents and copy information between programs with ease. You can even use other programs without leaving ECCO, allowing ECCO to become the control center of your computer.

Copying Information between Programs

You can copy information between ECCO and other programs using a tool called the Shooter. The Shooter lets you copy items from another program directly into ECCO views, copy information from ECCO into other programs, and copy information between programs. The Shooter provides a quick way to get information from electronic-mail, word-processing, or spreadsheet programs into the right location in your ECCO file.

You can copy information directly into ECCO folders.

Using other programs from within ECCO

You can directly access other programs while you are using ECCO:

- Create ECCO items that refer to programs or document files, and use the items to launch the programs or documents.
- Use commands from the ECCO Tools menu or toolbar to launch other programs and files.
- Embed OLE objects (graphics, charts, spreadsheets, and so forth) within ECCO items, or link objects to items.

You can add imported items to any number of folders and apply forms and filters to them.

Introduction to the Shooter

The Shooter is a tool that lets you place information from other programs into ECCO—or from ECCO into other programs—in one easy step. You can also use the Shooter to send information between two other programs. The arrow-shaped Shooter icon appears by default to the left of the Minimize button of the active program window whenever ECCO is running.

Using the Shooter, you can copy information between programs, create links between ECCO and information in other programs, and embed objects from other programs into ECCO.

The Shooter is the most efficient means of copying. It allows you to instantly copy information from your current program into any ECCO view. You don't have to choose Copy and Paste, and you don't have to leave your program.

By *linking* information from another program with ECCO, you ensure that changes made to the linked file are reflected in the ECCO copy. For example, you might link a spreadsheet file to ECCO so that when the spreadsheet changes you see the new information in ECCO.

By *embedding* information from another program into ECCO, you can edit and format it while you are working in ECCO. When you double-click an object embedded in ECCO, the program in which you created the object opens, and the object is ready for editing. For example, if you double-click an embedded graphic in ECCO, the painting program in which you created the graphic opens, and you can make changes to the graphic without really leaving ECCO.

Displaying the Shooter

By default, the Shooter icon appears on your screen whenever ECCO is running. You can drag the icon to any location for convenience.

The Shooter has its own customizable toolbar that can give you fast access to the commands you use most frequently.

You can display the folder window in the Shooter so that you can add information from other programs to your ECCO folders. You can display or hide the toolbar and the folder window, resize the Shooter display, or move or hide the Shooter icon.

To change the Shooter display

1. Switch to any program while ECCO is running. If the Shooter icon is not visible, from the Tools menu in ECCO, choose Options, then the Files tab. Select the Display Shooter option.

2. Click the Shooter icon.

   The Shooter menu appears.

3. From the Shooter menu, choose Show.

4. Choose one of the following commands:

   - To display only the Shooter icon, choose Icon.
   - To display the Shooter toolbar, choose Tools.
   - To display the Shooter toolbar and the ECCO folder window, choose the Tools and Folders command.

To hide or display the Shooter icon

From the Tools menu in ECCO, choose Options, then the Files tab. Select Display Shooter and the Shooter icon appears (or disappears) from view.

Setting Shooter Preferences

You can change the settings of the Shooter using the Preferences command on the Shooter menu. Under Preferences, you can switch to or open another ECCO file to which you want to send information. You can specify how you want text and graphics sent and indicate whether you want ECCO to confirm before sending.

To set Shooter preferences

1. In any other program, click the Shooter icon.

   The Shooter menu appears.

2. From the Shooter menu, choose Preferences, and then choose one of the following commands from the Shooter menu:

   - To switch to another open ECCO file, select Choose ECCO File, and then choose the ECCO file to which you want to switch. To open an ECCO file that isn't currently open, choose Open Another. The Choose ECCO File command is unavailable if the ECCO program is the active window.
   - To send all text as editable text, choose Send Text As, and then choose Editable Text.
   - To send all text as linked or embedded OLE objects, choose Send Text As, and then choose the appropriate option.
   - To send all graphics as linked or embedded OLE objects, choose Send Graphics As, and then choose the appropriate option.
   - To display or hide the Send Text Selection As dialog box when sending text, choose Send Text As, and then choose Ask Before Sending.

Sending Information to ECCO

The Shooter, lets you copy information from other programs into ECCO without switching to ECCO:

- You can send information to any ECCO file and to any ECCO view.
- You can send information relative to the last piece of information you sent to ECCO. In other words, the new information can be to the left of, to the right of, or at the same level as the last information sent. This feature simplifies outlining.
- You can send information to any ECCO folder. You can also send information to several folders at one time, while associating numbers, other text, or dates with it, by using ECCO forms.

To send information to ECCO

1. If the Shooter icon is not visible, from the Tools menu in ECCO, choose Options, then the Files tab. Select the Display Shooter option.

2. In any other program, select the source information (text or a graphic) that you want to send to ECCO.

3. Click the Shooter icon.

   The Shooter menu appears.

4. Choose one of the following commands from the Shooter menu:

   - To send the selected information to the active view or the Calendar in ECCO, choose the corresponding command.
   - To send the selected information to ECCO relative to the last information you sent, choose Relative to Last, and then choose the desired option.
   - To send the selected information to a folder, choose Folders, and then click a folder name in the folder window.
   - To add the selected information by form, choose Add By Form, and then choose the named form you want.

If you chose Ask Before Sending in the Shooter Preferences, ECCO displays either the Send Text Selection As or the Send Graphics Selection As dialog box.

Sending Information from ECCO

You can use ECCO to copy information created in ECCO to other programs. For example, you might create notes in a Notepad while talking to a client on the phone. You could then send those notes directly to your word-processing program to form the basis of a letter addressing your client's concerns.

To send items from ECCO to another program

You can send one or more items to another program from any ECCO view.

1. Select the items you want to send.

2. Click the Shooter icon.

   The Shooter menu appears.

3. From the Shooter menu, choose Other Program. ECCO lists only those programs that are currently active and that can have text or graphics pasted into them from the Windows Clipboard.

4. Choose the name of the program to which you want ECCO to send the information. ECCO inserts the information into the selected program's active file at the insertion point.

To send PhoneBook information from ECCO to another program

From the PhoneBook, you can send names and addresses in letterhead format to another program.

1. Switch to the PhoneBook.

2. Select the name of the person whose address you want to send.

3. Click the Shooter icon.

   The Shooter menu appears.

4. From the Shooter menu, choose Other Program. ECCO lists only those programs that are currently active and that can have text or graphics pasted into them from the Windows Clipboard.

5. Choose the name of the program to which you want ECCO to send the information. The Copy Name & Address dialog box appears.

6. Select one of the following options:

   - To send the selected name and address select the Address check box.
   - To send the selected name, address, and phone and fax number, select the Address & Work & Fax check box.
   - To send all fields on the current PhoneBook form, including customized fields, select the All Fields check box.
   - To send the selected name and address and current Outline notes select the Outline Notes check box.

7. Choose the OK button. ECCO inserts the PhoneBook information into the selected program's active file at the insertion point.

To retrieve PhoneBook information from ECCO to another program

You can retrieve name and address information from the PhoneBook and copy it to another program, such as a word processor.

1. If the Shooter icon is not visible, from the Tools menu in ECCO, choose Options, then the Files tab. Select the Display Shooter option.

2. In any other program, click the Shooter icon.

   The Shooter menu appears.

3. Choose the Get Address command from the Shooter menu.

   The Get Address dialog box appears.

4. Type the first few characters of the name you want. Any names in the PhoneBook that match the text appear in the text box.

5. Choose the Search button.

6. Select the name you want and take any of the following actions:

   - Specify whether you want to include work and fax phone numbers or all fields in the address you get.
   - Specify whether you want to get the home or business address.

7. Choose the OK button. ECCO inserts the PhoneBook information into the program's active file at the insertion point.

Sending Information Between Non-ECCO Programs

You can send text and graphics between virtually any two Windows applications that are running while ECCO is running. For example, you could send text created in your word-processing program to your electronic-mail program to avoid retyping information.

Sending Text

Sending text from one program to another works like copying and pasting — but in one easy step. When you click the Shooter icon, the Shooter copies the selected text to the Windows Clipboard, switches to the destination program, and pastes the copied text into the active file.

Sending Graphics

Graphics are either *embedded* in the destination file (if the destination program supports OLE objects or *pasted* into the destination file. Embedded graphics can be edited and formatted from the originating program; pasted graphics can be changed only from within the destination program.

To send information between non-ECCO programs

1. Select the text or graphic you want to send.
2. Click the Shooter icon.

   The Shooter menu appears.
3. From the Shooter menu, choose Other Program, and then choose the name of the program to which you want ECCO to send the information.

   ECCO switches you to the destination program and inserts the selection at the insertion point.

Shooter Compatibility

The Shooter automatically recognizes most Windows applications. If the Shooter does not work with an application, you may need to modify the Windows Registry (ECCO.INI for the ECCO 16-bit version).

1. From the Start button on the Windows taskbar, choose Run.
2. Type REGEDIT, then choose the OK button.
3. Expand the HKEY_CURRENT_USER folder.
4. Expand the Software folder.
5. Expand the NetManage folder.
6. Expand the ECCO folder.
7. Open the ECCO folder.
8. From the Edit menu, select New, then String Value.
9. Type the name of the application's executable file (i.e. GOCIS.EXE).
10. Double click on the String name

    The Edit String dialog box appears.
11. In the Value Data textbox, type the appropriate code from the following list:

- For applications that do not have keyboard shortcuts, type *101*.
- For applications that use CTRL + C (Copy) and CTRL + V (Paste), type *202*.
- For applications that use CTRL + INS (Copy) and Shift + INS (Paste), type *303*.

12. Choose the OK button.
13. From the Registry menu, choose Exit.

If you are using the 16-bit version of ECCO, add the following line to the [ECCO] section of ECCO.INI located in the Windows directory:

For applications that do not have keyboard shortcuts, add *<application name>=101*.

For applications that use CTRL + C (Copy) and CTRL + V (Paste), add *<application name>=202*.

For applications that use CTRL + INS (Copy) and Shift + INS (Paste), add *<application name>=303*.

For example, GOCIS requires the use of the CTRL + INS and Shift + INS. The entry in your ECCO.INI would look like this:

[ECCO]
GOCIS.EXE=303

About Running Other Programs

Once you have inserted a File and Directory Reference into your ECCO file, you can use the Launch command from the Tools menu to open any file or executable program. When you have inserted a directory reference, you can use the Launch command to open the directory and then launch any file in that directory.

You can also add any PC program executable (*.EXE), batch program (*.BAT), or other file (*.*) directly to the Get Disk Files menu. You can add icons for these items to the ECCO toolbar. Then, you can launch other programs, open files, or run batch programs with a click of the mouse.

Launching Other Programs from ECCO

Once you have inserted a File and Directory Reference into an ECCO file, you can launch it. When you launch a document file, ECCO starts the program and then opens the file.

To launch a file from an ECCO file

1. Double-click the filename.

   Or

   Select the reference to the file you want to launch, and then from the Tools menu, choose Launch.

2. ECCO launches the file. If the file no longer exists, ECCO lets you search for an existing file and update the reference with the new filename.

To launch a file within a directory

1. Select the reference to the directory that contains the file you want to launch.

2. From the Tools menu, choose Launch.

   The Choose File To Run dialog box appears, open to the proper directory.

3. From the File Name box, select the name of the file you want to launch.

4. Choose the OK button.

   ECCO launches the file.

Working with Disk Files

Using the Get Disk Files command on the Tools menu, you can insert filenames, executable programs, and even entire directories from your disk into your ECCO files. You can then launch these files and their associated programs from within ECCO. This feature allows ECCO to function as a file and program manager.

An item that contains a File Reference can be added to other ECCO folders, making the file available to you in many other contexts.

When you insert a file or program reference into an ECCO file using the Get Disk Files command, you paste its path (including the name of the file or directory) into ECCO. Each reference becomes an item with all the capabilities of any other ECCO item.

Inserting File and Directory References into ECCO

You can browse through your directory structure from within ECCO and select a file to insert.

To insert a reference to a single file

1. Select the item below which you want to insert the file reference.

2. From the Tools menu, choose Get Disk Files, and then choose Browse, Add As Item.

   The Choose File Name to Paste dialog box appears.

3. Select the name of the file you want to reference, and then choose OK. ECCO inserts an item with a file reference below the selected item.

Adding Files or Programs to the Get Disk Files Menu

You can launch any PC program executable (*.EXE), batch program (*.BAT), or other file (*.*) from the Get Disk Files menu. For example, you may want to add programs you use frequently, such as the Windows Explorer, to the Get Disk Files menu.

To add items to the Get Disk Files menu

1. From the Tools menu, choose Get Disk File, and then choose Browse, Add To Menu.

   The Add File Name or Program to Menu dialog box appears.

2. Take one or more of the following actions to locate the program or file that you want to run:
   - If the program is on a different drive, select the proper drive from the Look In drives list box.
   - Choose the folder or directory where the program or other file is located. ECCO displays the names of all files in the selected directory. To display only program files, select Programs from the Files of Type list box.
3. From the list of files, select the program that you want to run.
4. In the Menu Text box, type the program name or description you want displayed on the Get Disk Files submenu. Use any standard ASCII characters, including spaces and hyphens; ECCO adds the selected filename by default.
5. Use the arrow buttons to select a toolbar icon for your program.
6. Choose OK.

   The name you entered in the Menu Text box appears on the Get Disk Files submenu, and the toolbar icon appears in the Repeat box.
7. Add the icon to the toolbar. Using the right mouse button, click and drag the icon onto the toolbar.

You can then click the icon to launch your application, run your batch file, open another program file, and so on.

Managing Disk Files

After you have added your other programs, you may want to customize your Get Disk Files submenu. You can rename, delete, or reorder items on the Get Disk Files submenu.

To manage disk files

1. From the Tools menu, choose Get Disk file, and then choose Manage Menu.

   The Manage Menu dialog box appears.
2. Take one or more of the following actions:
   - To rename a program, select the name of the program in the list box, and then change the name in the Rename text box.
   - To delete a program from the menu, select the name of the program in the list box, and then choose the Delete button.
   - To reorder programs on the Get Disk Files submenu, select the name of the program in the list, and then choose either the Up or Dn reorder button.
3. When you have finished, choose OK.

The changes you made will appear on the Get Disk Files submenu.

Introduction to Linking and Embedding

OLE is a Windows term that stands for *object linking and embedding*. An OLE object is a piece of information from one program that is used by another program. OLE objects can be text, spreadsheet figures, graphics, charts, or other types of information.

When you *embed* an object, you place information created in another program into ECCO. Embedding is similar to copying, but with an important distinction — it doesn't require that you switch between programs to make changes to objects. Simply double-click the object you want to modify, and the originating program will open, allowing you to change the information.

When you *link* an object, you make an association (a reference or link) between ECCO and the source file that contains the object; no copy of the object is made. Accordingly, when you make changes to a linked object, you are making changes to the actual source file.

Embedding an object into your ECCO file or linking an object to your file has many benefits. By using OLE you can

- Extend ECCO's performance. You can work in programs that support OLE from within ECCO.
- Concentrate on a task by collecting in one location—an ECCO file—all the tools you need to complete the task. You can open the program from within ECCO, make your changes, and continue working without interruption.
- Update all linked objects in your ECCO file.

You can link and embed OLE objects in several ways:

- By using the Shooter
- By copying information from another program and then using the Paste Special command on the Edit menu
- By creating an embedded object “from scratch” with the Insert command on the Edit menu

Should I Link or Embed?

If you want an object to appear in several documents and if you want changes made in one place to be reflected every place the objects exists, you should link it. If you don't want changes made reflected everywhere an object exists, then you should embed the object.

For example, you might move a spreadsheet chart into your ECCO file but later add new figures to the spreadsheet—figures that affect the chart. If you want all such changes to the spreadsheet reflected in the chart you've inserted into ECCO, you should insert the chart as an OLE link. If you don't want the chart to change after you place it in ECCO, you should insert the chart as an OLE object.

Embedding OLE Objects

You can embed an object in ECCO in three ways:

- By using the Shooter.
- By using the Insert command on the Edit menu.
- By copying and pasting using the Paste Special command on the Edit menu. For graphics, you use the Paste command on the Edit menu.

To embed an existing object using the Shooter

1. Select the information (object) you want to embed in ECCO.
2. From the Shooter menu, choose Preferences, and then choose one of the following:
    - To send text, choose Send Text As.
    - To send graphics, choose Send Graphics As.
3. Choose OLE object.

   Or

   Choose Ask Before Sending.
4. Using the Shooter, send the object to ECCO (choose Active view, Calendar, Folders or Relative to Last).

   If you chose Ask Before Sending, ECCO displays either the Send Text Selection As or the Send Graphics Selection As dialog box. Select OLE Object.

To create and embed an object from within ECCO

1. Move the insertion point to the position in the ECCO file at which you want to embed the new object.
2. From the Edit menu, choose Insert Object, and then choose the program you'll use to create the embedded object.

   The program opens.
3. Create the object and then quit the program. If the program asks if you want to update the embedded object or save changes before proceeding, choose Yes.

The program window closes, and the ECCO window (containing the new embedded object) appears.

To embed an existing object using the Paste Special command

1. In another program, select the information (object) you want to embed in ECCO.

2. From the Edit menu, choose Copy.

3. Switch to ECCO.

4. From the Edit menu in ECCO, choose Paste Special, and then choose OLE Object. ECCO embeds the object at the insertion point.

Editing Embedded Objects

You edit an embedded object from within the program it was created in, without affecting the source file.

To edit an embedded object

1. Double-click the embedded object.

   Or

   Select the object and, from the Edit menu, choose Objects, and then choose Edit. The originating program opens, displaying the object.

2. Make any desired changes.

3. Quit the program.

   ECCO prompts if you want to update the embedded object in your ECCO file before proceeding.

4. Choose the Yes button.

The program window closes and the ECCO window (containing the edited embedded object) appears.

Linking OLE Objects

You can link an object from another program to ECCO in two ways—by using the Shooter or by using the Paste Special command.

To create an OLE link using the Shooter

1. Select the information (object) you want to link to ECCO.

2. From the Shooter menu, choose Preferences, and then choose one of the following:

   - To send text, choose Send Text As.
   - To send graphics, choose Send Graphics As.

3. Choose OLE Link.

Or

Choose Ask Before Sending.

4. Using the Shooter, send the object to ECCO.

   If you selected Ask Before Sending, ECCO displays either the Send Text Selection As or the Send Graphics Selection As dialog box. Select OLE Link.

To create an OLE link using the Paste Special command

1. In another program, select the information (object) you want to embed in ECCO.
2. From the Edit menu, choose Copy.
3. Switch to ECCO.
4. From the Edit menu in ECCO, choose Paste Special, and then choose OLE Link. ECCO inserts the link at the insertion point.

Editing Linked Objects

You edit a linked object from within the file in which it was originally created (the source file). When you edit a linked object, the changes are reflected in ECCO and in the original source file.

To edit a linked object

1. Double-click the linked object.

   Or

   Select the object and, from the Edit menu, choose OLE Links to display the Links dialog box. Select the link you want to edit, and then choose the Edit button. The source file opens.

2. Make any desired changes.
3. Quit the program. The program asks if you want to save changes before proceeding.
4. Choose the Yes button.

The program closes and the ECCO window (containing the updated linked object) appears.

Updating Links

ECCO can update links automatically, or you can update links manually:

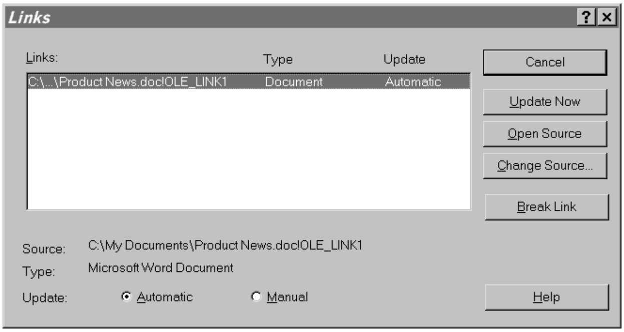
- Automatic updating is the default. If ECCO is running and the file is open, changes in the linked file are reflected immediately. If ECCO is *not* running when changes are made, you have the option of updating the links the next time you open an ECCO file.

- Manual updating can be used for any link. Use this option to maintain greater control over the updating of information. When you close or save a file that contains manually updated links, ECCO gives you the option of updating them.

To specify manual link updating

1. From the Edit menu, choose Links.

   The Links dialog box appears.



2. From the list, select the link or links you want to update manually.

3. Change the Update option to Manual.

4. Choose the OK button.

To update links manually

1. From the Edit menu, choose Links.

   The Links dialog box appears.

2. From the list, select the links you want to update.

3. Choose the Update Now button.

   ECCO updates the selected links

Changing Links

Once you've linked an OLE object to ECCO, you can change the link if you need to. For example, suppose you link a spreadsheet to ECCO and then save the updated spreadsheet under a different name, thus breaking the link to the file containing the most recent changes. You can change the linked item in ECCO so it reflects the new filename and re-establishes the link.

To change a link

1. From the Edit menu, choose Links.

   The Links dialog box appears.

2. From the Link list, select the link you want to change.

3. Choose the Change Link button.

   The Change Link dialog box appears

4. From the File Name list, choose a new file to which to link.

5. Choose the OK button, and then choose the OK button again to close the Links dialog box.

Resizing Linked or Embedded Objects

You can change the size of a linked or embedded object.

To resize a linked or embedded object

1. Select the object you want to resize.

2. Drag the handle in the lower-right corner of the object.

   Or

   Click the button in the upper-left corner of the object, and then take one of the following actions:

   - To reduce the selected object to a minimized size, choose Minimize.
   - To return an object to its previous resized state, choose Adjusted Size.
   - To return an object to its original size, choose Original Size.

Deleting Linked or Embedded Objects

You delete linked and embedded objects just as you delete any other item in ECCO.

To delete an OLE object

1. Select the object you want to delete.

2. From the Edit menu, choose Delete Items.

   The object is deleted from the file.

   Or

   If the Delete Items dialog box appears, choose OK to delete the object entirely from the file.

Correspondence Manager

Correspondence Manager integrates your ECCO PhoneBook with the most popular Windows word processors. Just select an individual contact or a group of contacts, and ECCO's Correspondence Manager gives you the following choices:

- Print your letter using your favorite word processor
- Fax your letter using Symantec's WinFax PRO

You can create a personalized single letter on the fly, or create form letters to be sent to a group of contacts.

Correspondence Manager can even automatically record the date and imbed a link to the letter as part of the record's contact history.

Note: Correspondence Manager is designed to work with the U.S. English versions of supported word processors. If you are using a word processing program written for distribution outside of the United States, Correspondence Manager may not work. In addition, Correspondence Manager is designed for U.S. English only. Foreign language menus are not supported.

Configuring the Correspondence Manager

The first time you start Correspondence Manager, you will be asked to configure it for use with your word processor.

1. Choose Correspondence Manager from the PhoneBook menu. If this is the first time you have used Correspondence Manager, the Setup dialog box will appear automatically.

   Or

2. If you have previously used Correspondence Manager and want to make changes the setup, choose the Setup button from the Correspondence Manager dialog box.
3. From the Word Processor - Name list box, select your word processor. Only the word processors and versions listed in the Name list box are supported in ECCO Pro 4.01. Word processors and versions **not** listed are **not** supported.
4. Click the Browse button next to the Word Processor - Program to Run field to browse and select the executable filename for your word processor.
5. The Correspondence Manager Directory and History Directory paths will default to subdirectories of your main ECCO directory.
   - **The Correspondence Manager Directory** is where your templates and Correspondence Manager configuration file will be stored. You may use the Browse button to change this location.
   - **The History Directory** is where the letters you create using Correspondence Manager will be saved. You may use the Browse button to change this location.

6. When you're done configuring Correspondence Manager, choose OK.

   You are now ready to begin using Correspondence Manager.

Using Correspondence Manager to Create a Single Letter

The Create Single Letter option in Correspondence Manager allows you to create personalized letters. ECCO performs the initial merge of the name, address and other fields you define, then pauses to allow you to type in a personal message or greeting.

To create a single letter:

1. Select a single name from the PhoneBook.
2. From the PhoneBook menu, choose Correspondence Manager.
3. In the Choose Letter to Send section, select the template you'd like to use from the list box.
4. Select Create Single Letter.
5. Under Send By, select Fax, if available, or Printed Letter.
6. Under Save Contact Record, choose Save Individual Copy or Don't Save Copy or Reference. By default, the name of the template you chose will be displayed in the text box. If you want the reference to your letter to say something different, you can change it now.
   - **Save Individual Copy** will save a copy of the letter in the History directory you chose when you configured Correspondence Manager, with a system-generated filename consisting of part of the contact's name and today's date. A sub-item will be created under the contact's name with the name of the template (or the text you typed in the box), and a launchable reference to that document. To view the document later, just double-click on the filename.
   - **Don't Save Copy or Reference** will still create a sub-item under the contact's name with the name of the template (or the text you typed in the box), but the letter will not be saved as a file and no launchable reference will be created.
7. Choose the Continue button.

   A message is displayed indicating that the letter is being created in your word processor.
8. Correspondence Manager starts your word processor, loads the template you chose, and fills in the merge fields. You can then type in any text and make any modifications you require.

   When you are done, choose Save and Print if you want to save the document and print.

   Or

Choose Save Only if you want to save the document and print at a later time.

When the document has been saved and/or printed, you will be returned to ECCO.

Using Correspondence Manager to Create Form Letters

The Create Form Letters option in Correspondence Manager allows you to create form letters using pre-defined templates. You select a group of contacts to send the form letter to, and ECCO merges the names selected with the template you created.

To create a form letter:

1. Select a group of names from the PhoneBook.
2. From the PhoneBook menu, choose Correspondence Manager.
3. In the Choose Letter to Send section, select the template you'd like to use from the list box. See the following section for instructions on creating, using and editing templates.
4. Click Create Form Letters.
5. Under Send By, select Fax, if available, or Printed Letter.
6. Under Send To, choose Selected Entries Only, All Items Currently In This View, or Entire PhoneBook.
    - **Selected Entries Only** will create the form letter only for the currently highlighted contacts.
    - **All Items Currently In This View** will create the form letter for all contacts in the current filtered view. For more information on filters, see the chapter on line help on "Other ECCO Features." If no filter is currently active, choosing All Items Currently In This View is the same as choosing Entire PhoneBook.
    - **Entire PhoneBook** will create the form letter for every contact in your PhoneBook.

    Note: Once a merge has started, there is no way to stop it. We recommend that you try out the Correspondence Manager with small sets of names and addresses to make sure everything has been setup correctly before you process a large job.
7. Under Save Contact Record, choose Save Individual Copy, Save Reference to Template, or Don't Save Copy or Reference. By default, the name of the template you chose will be displayed in the text box. If you want the reference to your letter to say something different, you can change it now.
    - **Save Individual Copy** will save a copy of the letter in the History directory you chose when you configured Correspondence Manager, with a system-generated filename consisting of part of the contact's name and today's date. A sub-item will be created under the contact's name with the name of the template (or the

text you typed in the box) and a launchable reference to that document. To view the document later, just double-click on the filename.

- **Save Reference to Template** will create a sub-item under the contact's name with the name of the template (or the text you typed in the box) and a launchable reference to the template. Individual copies of each letter created will not be saved as files.
- **Don't Save Copy or Reference** will still create a sub-item under the contact's name with the name of the template (or the text you typed in the box), but the letter will not be saved as a file and no launchable reference will be created.

8. Choose the Continue button.

   Correspondence Manager will start your word processor, merge the template with the contacts you selected, and print the letters.

Creating Templates in Correspondence Manager

You can create new templates from within Correspondence Manager using the following steps:

1. From the PhoneBook menu, choose Correspondence Manager.
2. Click the Create/Edit Template Button and choose New.
3. Enter a description of the template in the Template Description field.
4. Type a file name in the Template File Name field. You don't need to type a path, since the template will automatically be saved into the Correspondence Manager Directory you specified when you initially set up Correspondence Manager. Be sure that you give your template the proper template extension for your word processor.
5. Choose the fields you want to have in your template from the Choose Fields list. You can double-click on the fields you want, or highlight the fields and click the Add button. If you want to base the new template on an existing template, choose that template in the from the Based On drop-down list. The fields from the existing template will be added to the Fields Chosen box. You can add more fields from the Choose Fields list also.
6. Choose the Continue button.

   Correspondence Manager will launch your word processor and load the template.

   If you based the new template on an existing template, the fields from the existing template will already be inserted into this new template. Otherwise, the template will be blank.

7. Insert merge fields for the fields you chose in ECCO according to your word processor's instructions. Add any text that you want to be part of the template.

8. When you’re done configuring your new template, choose the Save & Return button at the top of the screen to return to ECCO.

9. You will see your new template description added to the drop-down list of templates to use. Choose the Cancel button to close the Correspondence Manager dialog box.

   Note: When you create a template in Correspondence Manager, two files will be created in the default Correspondence Manager directory—one will have the template extension for your word processor, and the other will have a .INI extension. If you want to share a template with another user, you need to give them both files to put in their default Correspondence Manager directory.

Using Existing Templates From Your Word Processor With Correspondence Manager

You can also use templates that you previously created in your word processor with ECCO’s Correspondence Manager.

1. Make a copy of the template and open the copy in your word processor. Be sure the new file has the proper template extension for your word processor.

2. Delete any existing merge fields in the template and close the file.

3. Move the copy to your ECCO Correspondence Manager directory.

4. From the PhoneBook menu, choose Correspondence Manager.

5. Click the Create/Edit Template Button and choose New.

6. Type a description of the template in the Template Description field.

7. Type the file name, including extension, in the Template File Name field. You don’t need to type a path, since the template is in the Correspondence Manager Directory you specified when you initially set up Correspondence Manager.

8. Choose the fields you want to have in your template from the Choose Fields list. You can double-click on the fields you want, or highlight the fields and click the Add button.

   The Based On entry should say <none>.

9. Choose Continue.

   Correspondence Manager will launch your word processor and load the template.

10. Insert merge fields for the fields you chose in ECCO according to your word processor’s instructions.

11. When you’re done configuring your new template, click the Save & Return button at the top of the screen to return to ECCO.

12. You will see your new template description added to the list box of templates to use. Choose the Cancel button to close the Correspondence Manager dialog box.

Editing Existing Templates

If you need to edit a template, use the following steps:

1. From the PhoneBook menu, choose Correspondence Manager.

2. Select the template you wish to edit from the drop-down list.

3. Click the Create/Edit Template Button and choose Edit.

   The Create/Edit template dialog box will appear, showing the fields currently in your template

4. Add or remove any fields you want to change and choose Continue.

   Correspondence Manager will start your word processor and load the template.

5. Delete the merge fields for any fields you removed in the Create/EditTemplate dialog box, and add merge fields for any new fields you added in Create/Edit Template. Make any necessary text changes to the template.

6. When you’re done editing your template, choose the Save & Return button at the top of the screen to return to ECCO.

7. Choose the Cancel button to close the Correspondence Manager dialog box.

Deleting Existing Templates

To delete a template you no longer need, use the following steps:

1. From the PhoneBook menu, choose Correspondence Manager.

2. Select the template you wish to delete from the drop-down list.

3. Choose the Create/Edit Template Button and choose Delete.

4. Choose Yes in the Confirm Template Deletion dialog box.

5. Choose Yes again in the Delete Document File dialog box to have the template file and .INI file deleted from your default Correspondence Manager directory.

6. Click the Cancel button to close the Correspondence Manager dialog box.

Faxing using the Correspondence Manager

The Correspondence Manager uses WinFax PRO to send faxes directly from ECCO.

Due to limitations with the DDE interface, WinFax PRO does not recognize local area codes when they are passed to them from applications like Correspondence Manager.

Thus, WinFax will try to dial the local area code, and your fax will fail. The only work around is to remove local area codes from fax numbers in your ECCO file.

You can also use the Correspondence Manager with other fax software using the following method:

1. Make sure your word processor is set up with the fax modem as the default printer.

2. In the ECCO Correspondence Manager, select "Printed Letter" checkbox. This will send the output directly to the fax modem via your word processor.

Troubleshooting and Error Messages

If you have problems using Correspondence Manager or encounter error messages, request the *Correspondence Manager Troubleshooting and Error Messages* Tech Note from ECCO Technical Support.

Chapter 11. Folders

About Folders

As you manage information, you're often faced with two challenges:

- the need to categorize information.
- the need to put the same information in several places.

ECCO folders let you handle these challenges easily.

Understanding Folders

ECCO folders are like the paper folders in your file drawers. Folders allow you to collect related items of information. Just as you'd collect all papers and receipts related to insurance in a paper folder labeled "Insurance," ECCO lets you create a folder, name it "Insurance," and use it to collect information related to that topic.

And just as you might place a photocopied item into multiple paper folders, you can place an ECCO item into multiple folders. And whenever you change one ECCO item, the copies in other folders are automatically changed in the same way. Folders are the ideal tool for managing the large volume of diverse information that confronts you every day.

Definitions: Items, Folders, and Views

As you begin to work with ECCO folders, it's important that you understand three basic ECCO concepts: *items*, *folders*, and *views*.

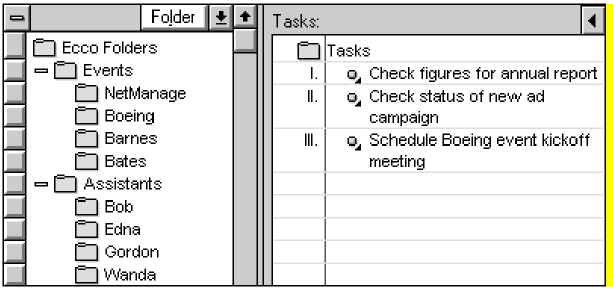
- **Items:** These are the basic element of information in ECCO. Every bulleted line in a Notepad, every name in the PhoneBook, and every appointment in the Calendar is an item. Put another way, every line of text or graphics with an item bullet to its left is an item.
- **Folders:** These are containers used to collect and cross-reference related items. Whenever you create items in an ECCO view, you are actually adding them to a folder. For example, when you create an appointment in the Calendar, ECCO automatically adds that appointment item to a folder named Appointments. Similarly, whenever you add a name to your PhoneBook, ECCO automatically adds that name to the PhoneBook folder.
- **Views:** Windows showing one or more folders and the items in those folders. The PhoneBook view, for example, displays the PhoneBook folder and all of the items (names) in that folder. Notepad views can display the items in one or more folders of your choice.

Using Folders: Examples

Consider the following three typical users and their information management needs. Each of them needs to view information in multiple contexts.

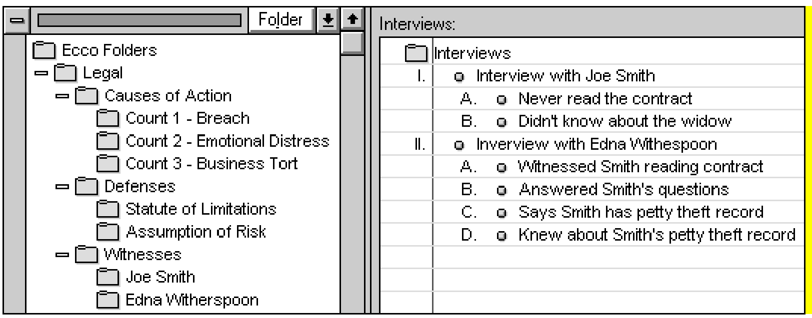
Bob, Hanna's administrative assistant, creates a Notepad of tasks to be done. Items in the Notepad need to be collected in the following groups: items that need to be reviewed by a coworker; items related to a particular event; and items that need immediate resolution. Some items would need to be in all three folders. Bob sets up his ECCO folders so that he can view items in any of these contexts, together with the other items of that type, without delay.

Sample folder setup for task notes



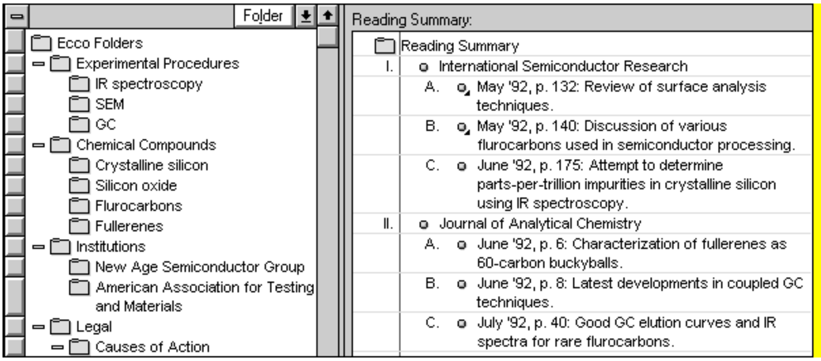
Stephanie, a lawyer, puts together a Notepad that shows the logical flow of a case. When she interviews a witness, Stephanie wants to easily review all points that pertain to that witness. She must be able to view the information from two perspectives: according to its degree of value to the case and as a set of problematic points, drawing information from other cases.

Sample folder setup for case notes



Pat, a research chemist, gathers information for each type of experimental procedure, chemical compound, and institution she works with. As she creates notes on journal articles, she records the important points in each article in several places. When she wants a summary of her reading on a specific compound, all the relevant information is available in one place.

Sample folder setup for research notes



Using Folders: An Overview

The basic steps for using folders are described in the following procedures.

To display the folder window

From the View menu, choose Folder Window. The folder window appears.

To create and name folders

1. From the Folder menu, choose New Folder.
2. Type a name for the folder.
3. Reorganize the folders as you would any outline item, by dragging the folder icon.

To add items to folders

1. Click on the item’s bullet.
2. Drag the item bullet to a folder in the folder window.

   The item is added to the folder and remains in the current view as well. You can remove the item from the current view by choosing Delete Items from the Edit menu.

To view a folder’s items

Double-click any folder in the folder window. The folder and its items appear in a scratch Notepad.

Working with Folders

When you work with folders, you actually work with several ECCO elements:

- The Folder window
- Default folders
- Folder outlines

The Folder Window

In the Folder window, you can view existing folders as well as perform a variety of operations on them. You display the folder window at the left side of the ECCO program window. To view the folder window, from the View menu, choose Folder Window. To hide the folder window, choose Folder Window again; or choose the Close button in the upper-left corner of the folder window.

Folders: In the folder window, you can add new folders and edit, rearrange, or select existing folders.

Folder menu: Choose commands from this menu to switch between Assign and Edit modes, to add or delete folders, to change folder types or properties, to assign by keys, or to make folders public.

Folder buttons: Checkmarks on these buttons indicate that the selected items in the active view have been added to these folders.

Zoom button: Click this button to display, hide, or resize the folder window.

Close button: Click this button to close the folder window.

You work with the folder window in one of two modes:

- To add items to a folder, use *Assign* mode. You switch to Assign mode by clicking outside the folder window or by choosing Assign Folders from the Folder menu.
- To add new folders and edit and rearrange existing ones, use *Edit* mode. You switch to Edit mode by choosing Edit Folders from the Folder menu or by clicking the title bar of the folder window.

Organizing the Folder Window

To more easily understand the relationship between folders, you can organize them in a way that makes most sense for your needs. For example, you can place folders containing similar material into groups and at the same time make other folders subordinate to them (thereby creating *subfolders)*. You can also expand and collapse folders to view them more easily. You can even create multiple-folder columns so that you can view multiple values in one cell. For more information, see the chapter or online help on “Columns and Values.”

To organize the Folder window, choose Edit Folders from the Folder menu, and then perform any of the following actions:

- Move a folder up, down, right, or left in the outline by dragging its folder icon or by pressing ALT+LEFT ARROW or ALT+RIGHT ARROW.
- Expand and collapse a folder that contains subfolders by clicking the plus or minus sign to the left of the folder icon.
- Create a new folder at a lower or higher level than the selected folder by pressing CTRL+R (to create a subfolder) or CTRL+L (to create a folder one level higher).

In addition, you can apply formatting in the folder window. For more information, see the chapter or online help on "Working with Items and Formatting."

Default Folders

ECCO provides the following default folders:

- **PhoneBook**: Contains items (in this case, names) created in the PhoneBook. The PhoneBook folder has several subfolders containing related information entered in the PhoneBook, such as telephone numbers and addresses.
- **Appointments: C**ontains items created in the Appointment section of the Calendar.
- **To Do's:** Contains items created in the Tickler section of the Calendar.
- **Done, Start Dates,** and **Due Dates:** Allows you to organize scheduled items.
- **Search Results:** Contains items found when you search the entire ECCO file.
- **New Columns:** Contains subfolders based on any new columns you create in the column pane.

Note: ECCO includes several templates that provide folder structures for some typical types of projects or applications. Each ECCO template includes a view titled "How to use this File." Depending on the template you use, you will see additional folders in the folder window. New ECCO files are based on the template DEFAULT.ECT in your ECCO directory.

Creating Folders

When you need to create a new information category, you can create a new folder in the folder window.

To create a folder

1. Open the folder window, if necessary, by choosing Folder Window from the View menu.
2. From the Folder menu, choose New Folder.
3. Type a name for the folder.

Note: You can also create a folder by choosing New Folder from the Folder menu. When you create a new Notepad, ECCO creates a new folder with the name of the Notepad. You can edit the name at any time.

Renaming Folders

You can change the name of a folder from any location. The name will change wherever the folder appears.

To change the name of a folder

1. From the Folder menu, choose Edit Folders.
2. In the folder window, select the name of the folder you want to change.
3. Type a new folder name.

Note: You can also change the name of a folder from a Notepad. In the Notepad, select the folder name, and then type a new name for the folder.

Deleting Folders

When you no longer need a folder, you can delete it from an ECCO file. When you delete a folder, its subfolders are deleted as well. You cannot delete a default ECCO folder, such as PhoneBook or Appointments.

Note: When you delete a folder from the folder window, items found in only that folder are permanently deleted from your ECCO file. If you want to continue to view them, be sure to move them to another folder before you delete the folder.

To delete a folder

1. From the Folder menu, choose Edit Folders.
2. Select the folder that you want to delete.

   You can delete multiple folders using any of the methods for multiple selections.

3. From the Folder menu, choose Delete Folder.

   If the folder is empty, the folder name disappears from the folder window.

   If the folder contains items, ECCO displays the Delete Folder dialog box, which includes a warning that the folders will be removed from all views and columns. Choose the OK button to complete the deletion.

Note: If the folder you delete is the only folder in a Notepad, an untitled folder is created to preserve the view.

Adding Items to Folders

You can add an item to a folder in any of the following ways:

- by typing a new item into any ECCO view
- by dragging an item from a view to a folder in the folder window
- by selecting an item and choosing a gray folder button in the folder window
- by using columns

Typing Items into a View

You can add items to folders by typing them into a view. As you type, ECCO adds the items to folders as described in the following table:

Type of Item	Folder
Calendar appointment	Appointments
Calendar tickler item (created in the Tickler section)	Date folder of your choice
PhoneBook name	PhoneBook
Notepad item	Folder above the item in the Notepad

Adding Items with the Folder Window

You can add items to folders by dragging the items into the folder window or by using the folder options pop-up menu.

To add items to folders

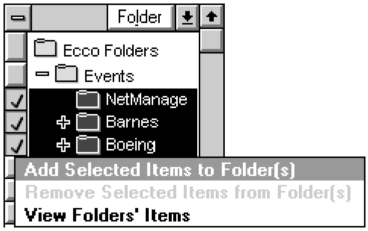
1. If the folder window is not displayed, from the View menu, choose Folder Window.
2. Switch to the view that contains the items you want to add to folders.

   You can add items from any view to any folder or group of folders.
3. Select the item you want to add by clicking it.

   You can select a single item, multiple items in sequence, or nonsequential multiple items.
4. Drag the items into a folder in the folder window.

   Or

Click a gray folder button at the left side of the folder window to select a folder, or drag through several folder buttons to select multiple folders, and then choose Add Selected Items To Folder(s) from the folder options pop-up menu, as shown in the following illustration.



5. If ECCO displays an edit box, enter a value in the box, and then choose the checkmark button.

   Or

   If you are adding the item(s) to multiple folders, ECCO displays the Specify Folder And Column Values dialog box. Enter a value for each folder, and then choose the OK button.

For the selected item, ECCO displays a checkmark in the gray folder button for each folder to which the item has been added.

Auto-Assigning Items to Folders

ECCO's auto-assign feature automatically evaluates items throughout your file (PhoneBook, Calendar, and Notepads) and gathers them into specific folders.

For example, you can:

- Have ECCO gather items that contain the word "Action" to your Tasks folder
- Assemble all items related to a particular company or person into a folder
- Have personalized codes to quickly reference items to various folders and views

Creating Auto-Assignment Rules

To allow ECCO to auto-assign items to a folder, you first must specify a *rule* for the folder. A rule is simply a text string (word) that ECCO will compare against items that you create. If the item text matches the rule, it is added to the folder.

Five ways of defining rules are available:

- **A single word**: You can assign every item containing a single word to a folder.
- **A phrase with blanks:** In this case, a blank says that you want to collect any item containing the words indicated. If you have a rule that says "Bill Smith," you could collect items such as "Bill Smith," "send bill to Smith Uptown Construction for

sinks," or "Jennifer Smith-Banks hired Bill Williamson." However, "Billings and Smithton" would not be considered a fit for this rule and would not be added to the folder.

- **A phrase with underscores:** Underscores can be substituted as blanks. Replacing the blanks with underscores would make "Bill Smith" read "Bill_Smith." In this case, this rule would be treated as if it were a single word.
- **A prefix:** You define a prefix by using an asterisk at the end. A prefix rule that is defined as "mari*" would collect every item beginning with those letters. This rule would assign items containing the words "maritime," "Mariners," "Marilyn," "marigolds," "marimba," and "marinades" if they all were used in one file.
- **A compound rule:** This rule combines any of the four rules above to form one, more complex rule. An example of this would be "Dav*_Jones" which looks for both "David Jones" or "Dave Jones."

Adding Auto-Assignment Rules to a Folder

Rules are assigned to and removed from a particular folder through the Auto Assignment Rules dialog box. You can assign up to 255 rules to a folder.

To assign rules to a folder

1. In the folder window select the folder to which you want to add the rule.
2. From Folder Menu, choose Auto Assign Rules.

   The Auto Assign Rules dialog box appears.
3. Choose New.
4. Type your rule in the box where the Rule 1 text appears.
5. Repeat steps 3 and 4 for each additional rule you want to add.
6. Choose OK when you have finished.
7. Choose one of the following options:

- To search the entire file for items that currently match the new rule, choose Search All.
- To match only newly created or modified items, choose Don't Search.

To remove rules from a folder

1. In the folder window, select the folder from which you want to remove the rule.
2. From Folder Menu, choose Auto Assign Rules.
3. Select the rule you wish to remove.

4. Choose the Delete button.

5. Repeat steps 3 and 4 for each additional rule you wish to remove.

6. Choose OK when you have finished.

Note: Deleting a rule will not remove items that have been assigned to a folder using the rule.

Removing Items from Folders

You can remove items from folders in either of the following ways:

- Use the folder options pop-up menu to remove the selected items from one or more folders that you select in the folder window.
- Delete an item from a Notepad, thereby removing that item from the folder under which it appears or from all folders.

Note: You can also remove items from folders by deleting checkmarks or values from columns in the column pane. For more information, see the chapter or online help "Columns and Values."

Removing Items from a Notepad

When you delete a top-level item from a Notepad you can choose to remove it from the folder in which it appears or from all folders. Top-level items are located at the highest (left-most) level of a view. Deleting a top-level item also deletes its subitems. When you delete a subitem, it is removed from all folders and deleted from the ECCO file.

To remove items from a Notepad

1. In a Notepad, select the items you want to remove.

2. From the Edit menu, choose Delete Items, or press CTRL+D.

   Depending on the items you selected, one of the following events happens:

- If you selected items that were assigned to only one folder, the items are removed from the folder and, therefore, from the ECCO file.
- If you selected top-level items that are currently in multiple views, ECCO asks whether you want to remove the items from the current folder or from the entire ECCO file.
- If you selected subitems that were added to multiple folders, ECCO asks you to confirm that you want to remove the items from all folders to which they have been added.

Removing Items Using the Folder Window

Use the folder options pop-up menu in the folder window to remove selected items from any folder.

To remove items from folders using the folder window

When you remove an item from a folder using the folder window, the item remains in all other folders to which it has been added.

1. In the active view, select the item you want to remove.

   You can select a single item, multiple items in sequence, or non-sequential multiple items.

2. In the folder window, click the gray button at the far left of the folder from which you want to remove the items.

   Or

   Drag through several buttons to select multiple folders. The folder options pop-up menu appears.

3. From the folder options menu, choose Remove Selected Items From Folder(s).

   The selected items are removed from the folder(s).

Viewing Folder Contents

To view the contents of a folder, you can:

- Double-click a folder in the folder window to display its contents in the scratch Notepad.
- Create a new Notepad. You can add any folder to the Notepad and see all the items in that folder.
- Add folders to an existing Notepad. You can add the same folders to multiple Notepads, allowing you to view the same information in different contexts.

Viewing a Folder’s Contents in the Scratch Notepad

The fastest and easiest way to view a folder’s contents is to display it in the Scratch Notepad view.

To view a folder’s contents in the Scratch Notepad

Double-click any folder in the folder window. The folder and its items appear in the Scratch Notepad view.

Creating a New Notepad Based On a Folder

When you create a new Notepad, the information in it is saved whenever you save your ECCO file. You can open the Notepad from the View menu by choosing the Notepads command and then choosing the Notepad's name from the list.

To create a new Notepad

1. From the View menu, choose Notepads, and then choose New Notepad.

   The Create Notepad dialog box appears.

2. In the Name box, type a name that describes the information you will add to the view.

   This name appears in the menu when you choose the Notepads command.

3. Choose the Options button.

   The Create Notepad Options dialog box appears.

4. To add folders to the Notepad, click the folder names in the folder window displayed in the dialog box.

   As you add them to the Notepad, the folder names appear in the list box on the right.

5. To remove a folder, highlight the folder in the list on the right, and then choose the Remove button.

6. When you have finished adding folders, choose the OK button.

7. Choose the OK button again.

   ECCO displays a new Notepad that shows the items in the folders you added. The name of the Notepad appears at the top of the Notepad window.

   The next time you choose Notepads from the View menu, this name will appear at the end of the menu. To switch between Notepads, choose names from this menu; or, click the tabs at the bottom of the ECCO program window.

Adding Folders to a Notepad

You can add additional folders to an existing Notepad. When you do, you see the items contained in those folders.

To add folders to a Notepad

1. Switch to the Notepad to which you want to add additional folders.

2. If the folder window is not already open, from the View menu, choose Folder Window.

   The folder window is displayed.

3. Drag into the Notepad the folders you want to add.

Note: You can also add folders to a Notepad using this method. From the View menu, select Choose Notepad Folders. In the Choose Notepad Folders dialog box, click folder names to add them to the view.

Removing Folders from a Notepad

You can remove folders from a Notepad at any time. When you remove a folder from a view, you are removing it from the view only—you are not deleting it or its items from the file.

Every Notepad must contain at least one folder. If you remove the only folder in the Notepad, a new, untitled folder is created to preserve the view.

To remove folders from a Notepad

You can remove a folder from a Notepad by dragging it or by using the Remove Folders command.

1. Select the folder you want to remove from the Notepad.
2. Using the mouse, drag the folder(s) out of the Notepad window.

   Or

   From the Edit menu, choose Remove Folders.

Note: Use the Choose Notepad Folders dialog box to remove folders from a Notepad. From the View menu, select Choose Notepad Folders. In the Choose Notepad Folders dialog box, highlight the folders you want to remove, and then choose the Remove button. Choose the OK button.

Folder Types and Folder Values

A folder can store a value with each item it contains. A folder value gives you a way to associate an additional piece of information with each item. Because an item can be added to many different folders, each item can have many different values associated with it.

Before you can associate items with values, you must declare the folder's *type*; that is, you must specify what kind of values the folder will contain. Values are of four types:

- **Text values** are comments, descriptions, or miscellaneous text.
- **Number values** are numerical information.
- **Date values** are date and time information.
- **Pop-up list values** are user-defined values.

Accordingly, a folder can be one of these four types as well. A fifth folder type—checkmark folder—is also available.

Checkmark Folders

Checkmark folders are not associated with values. They simply provide an opportunity to include or exclude an item.

A new folder is, by default, a checkmark folder.

Text Folders and Values

Text folders contain any text of up to 32,000 characters in length. Here are some examples of ways you might use text values:

- Suppose a set of items describes each part of a problem. As you resolve each item, you might type a text value that describes the solution to that part of the problem.
- For a set of items describing proposed marketing plans or business strategies, you might create several text folders, one for each manager, and enter a text value describing each manager's response to each proposal.
- You might create a list of outside consultants with whom you work, create text folders for each project, and type a brief summary of each consultant's involvement with a project.

Number Folders and Values

Number folders let you associate numbers with items. Here are some examples of ways you might use number values:

- Associate a budget amount with each of the tasks that constitute a project
- In a list of equipment, associate an inventory number or a quantity with each item
- In an outline that describes courier deliveries, associate a confirmation number with each delivery

Note: ECCO accurately records numbers of up to seven digits long.

Date Folders and Values

The management and scheduling of tasks is integrally associated with dates. You can associate dates with items by:

- creating appointments and tickler items in the Calendar
- entering dates in date columns
- adding items to date folders in the folder window
- making any selected item a tickler when you choose Ticklers from the Tools menu

Unless you specify otherwise by changing the date properties, when you give an item a date, the item appears in the Calendar.

Pop-up List Folders and Values

Pop-up list folders let you define a list of values (such as high, medium, and low for a priority list) and then associate those values with items.

Using pop-up list folders, you can

- Quickly associate with an item values from a user-definable list—without retyping
- Standardize the entry of values so that filters and sorts can be applied to them
- Add or edit the values in the pop-up list

Declaring the Folder Type

Before you begin adding items to a folder, you should declare the folder’s type.

To declare the folder type

1. In the folder window, choose Edit Folders from the Folder menu.
2. Select a folder that contains no items.
3. From the Folder menu, choose Folder Type.
4. Choose a folder type from the menu.

   If you choose a pop-up list folder type, the Pop-up List Column Values dialog box appears in which you can define a set of values for the folder.

Customizing a Folder’s Properties

Date, pop-up, and number folders can be customized to reflect specific user preferences.

Customizing a Date Folder

Select a date folder and choose Properties from the Folder menu to display the Date Properties dialog box.

In this dialog box, you can select from the following options:

Default Settings For New Items Specify the default settings. You can override these default settings for individual items using the Date Settings dialog box. For more information, see the chapter or online help on “The Calendar.”

Note: These settings affect items that will subsequently be placed in the folder as well as any items currently in the folder that match the pre-existing defaults.

- **Show Item In Calendar's Tickler Section:** Choose whether to show the items added to the folder in the Calendar's Tickler section. If you choose to display the items in the Tickler section, you can select the default lead time and follow-up time during which you'd like the items to be displayed.
- **Default Recurrence:** ECCO allows you to specify an appointment or tickler recurrence at a time interval you specify. You can select an option from the list to change the default setting for the recurrence pattern you use most often for items using this date folder.
- **Default Alarms:** Select an alarm from the list to change the default setting for the alarm you use most often for this date folder.
- **Calendar Busybar Color:** Select a color from the list to change the default color for the Busybar displayed at the left side of the Calendar view.

Entering Dates In this portion of the Date Folder Properties dialog box, you can specify the default display of the value edit box that appears when you add a date value to an item in a column or in the folder window.

- You can choose whether to initially display an edit box, allowing you to type the date from the keyboard, or the Date Settings dialog box, allowing you to select a date and other properties using the mouse.
- You can choose whether the value edit box always includes fields for entering time in addition to a date or whether the time fields are displayed only for appointments.

Customizing a Pop-up List Folder

When you create a new pop-up list folder or when you choose Properties from the Folder menu, ECCO displays a Pop-up List dialog box in which you can create and change pop-up list values. In this dialog box, you can

- Add new values to the list by choosing the New button.
- Choose a value and rename it in the Edit box.
- Delete values from the list by choosing the Delete button.
- Reorder the values in the list.

Note: When you type a new value in an existing pop-up list, the value is added to the end of the pop-up list.

To add values to a new pop-up list folder or column

1. Create a new pop-up list folder or column.

   ECCO displays the Insert Pop-up List Column Values dialog box.

2. Choose the New Pop-up Value button. "Value 1" is highlighted in the Edit box.

3. Type the first value, overtyping "Value 1."

4. Choose the New button (without choosing OK) and continue to add the values you want to include in the pop-up list.

   Each time you choose New, the previously entered value appears in the list box.

5. When you have typed the last value, choose the OK button.

Customizing a Number Folder

Select a number folder and choose Properties from the Folder menu to display the Number Properties dialog box. Using this dialog box, you can specify the type of number you want the folder to display. You can choose from 13 different number formats: general, 0.00, 0%, $0.00, and so forth.

Note: If you select a number column and choose Properties from the Column menu, you can specify the type of number format, the alignment of the number in the column, and the column width. For more information about working with columns, see the chapter or online help on "Columns and Values."

Understanding an Item's Context

ECCO gives you two easy ways to view an item's context:

- You can view a folder's items. When you view a folder's contents in a Notepad, ECCO displays all items that have been placed in that folder. Some of these items might not be meaningful without their parent items displayed for context. To give meaning to such items, ECCO displays the parent items in green text to indicate that these green items were not actually placed in the folder.
- View the folders to which an item has been added. Using the Show Item Info command on the Item menu, you can look at all of an item's folders and values from anywhere in ECCO.

Understanding Context Parents

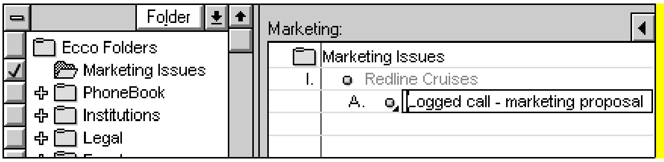
Problem: Viewing Only the Information You Need

Too much information is as much of a problem as too little. Once you've collected a large body of information, the problem is no longer "How do I find and view this information?" but "How do I view only the most relevant information and still understand it?"

Solution: Context Parents

Consider the following example. Suppose you've just logged a phone conversation in your PhoneBook. In this conversation, your friend Pat made a marketing proposal. You'd like to track this proposal under your "Marketing Issues" folder, so you drag this conversation into the "Marketing Issues" folder in the folder window.

When you next look at your Marketing outline view (which contains this folder), it might look like this:



Because the item logging the conversation was explicitly added to the folder, it appears in black. All of its subitems have been brought in and are hidden (as indicated by the black triangle). The name Redline Cruises, from the PhoneBook, was not added to the folder and appears in this outline view solely to provide meaning and context. It appears in green to indicate that it has not been explicitly placed in the folder. In ECCO, this item is called a *context parent*.

If the name Redline Cruises had been explicitly placed in the Marketing Issues folder, all other appointments, conversations, and other items, appearing under that name in the PhoneBook would appear here as well. This would obscure the marketing proposal that you wanted to track.

The ability to add a subordinate item to a folder without adding its parent allows you to exclude extraneous information, while the appearance of the context parent provides the necessary context to understand the item.

Note: If a filter is applied in an outline view, context parents not meeting the criteria are displayed in green. For more information, see the chapter or online help on “Other ECCO Features.”

Viewing an Item’s Folders

Another way to view an item’s context is to view the folder names to which an item has been added. You can view an item’s folders in either of two ways:

- Select the item and open the folder window. A checkmark on a Folder button indicates that the selected item has been added to that folder.
- Use the Show Item Info command on the Item menu to quickly see which folders an item has been added to and what column values have been associated with the item.

Using the Show Item Info dialog box, you can move quickly through the items in a view, getting a broader view of the item’s context, viewing an item’s folders, and even changing the values associated with a given item.

To view an item’s folders

1. Select the item whose folders you want to view. Select the first item in the view if you want to step through all the items in a view.
2. From the Item menu, choose Show Item Info.

   The Show Item Info dialog box appears. The text of the selected item is displayed in the Item Text box. The folders to which the item has been added (or the columns in which the items have been given values) are listed on the left. The values associated with the selected item for each folder or column are listed to the right.

3. To edit a value, select it, and then change the value in the value edit box. To clear a value, select it, and then choose the Clear Value button.

4. To view the folders for the next item in the view, choose one of the Next Item buttons.

   The Next Item buttons let you move through the items in the active view without closing the dialog box.

5. When you are done viewing items' folders, choose the Done button.

   If you have made changes in the dialog box, the Done button changes to an OK button. Choose the OK button when you have finished viewing and making changes in the dialog box.

Under the Hood: Item Levels

When you add an item to a folder, ECCO treats the item differently, depending on whether it is a top-level item or a subitem. ECCO automatically adds top-level items to the folder in which they are typed, whereas you must explicitly add subitems to a folder before they are added to it. When you add an existing subitem to a second folder, ECCO displays the parent item in green in any views displaying the second folder to allow you to see the context of the item without viewing a lot of information you don't need.

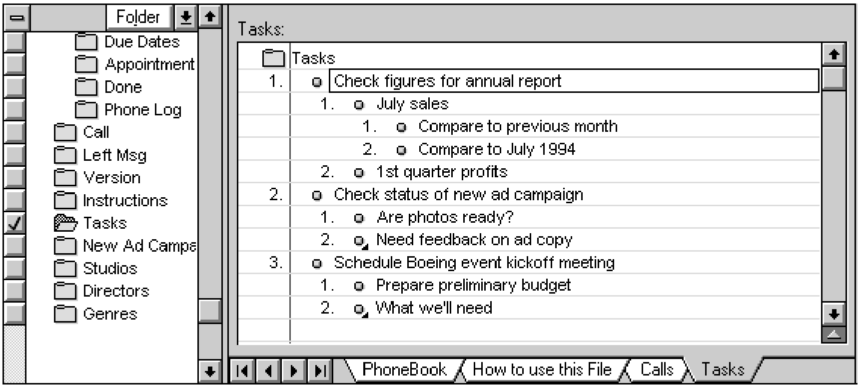
- When you promote or demote an item to or from the first level in a Notepad, ECCO adds it to or removes it from the folder in which it appears.
- When you promote or demote an item or its context parents in a Notepad, ECCO changes the context information as well.

Item Levels and Folders

When you type and rearrange items in a folder that appears in a Notepad, those items are added to and removed from that folder in different ways, depending on their level.

- When you type a top-level item under a folder name, it is automatically added to that folder. If you select the item, you will see a checkmark in the folder button next to the folder name in the folder window.
- Because a Notepad shows all subitems of an item included in a folder, ECCO does not explicitly add subitems to a folder when you type them. This makes it easier to remove items from folders since removing a parent item will automatically remove all the subitems.

Top-level items are added automatically to the folder



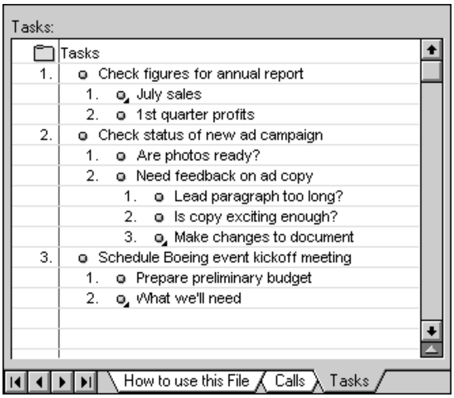
Chapter 12. Columns and Values

ECCO provides you with the flexibility you need to organize related items of information in a useful way. You use ECCO views and folders to organize and collect items of information. You use columns to display additional pieces of information associated with items. Also, columns are a quick way of seeing which items are in a particular folder.

Example: Tracking Information in Columns

As the owner of an event-coordination business, Hanna has been using an ECCO file to enter items of information regarding all aspects of her business, and she has been organizing those items into folders. One of those folders is a “Tasks” folder to which she adds items for each of the major tasks she must accomplish in the coming week.

Items in Hanna’s folder

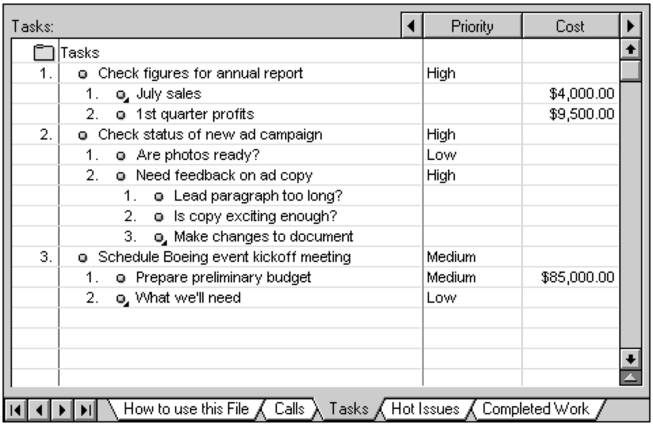


Hanna decides she would like to track additional information, such as priority and cost, for each item. Columns are the perfect answer to her need.

Entering Values in Columns

The first thing Hanna wants to do is prioritize the tasks for the week. In the Notepad displaying the Tasks folder, she displays the column pane (by choosing Show Columns from the Column menu) and inserts two columns – Priority and Cost. She then assigns a “High,” “Medium,” or “Low” priority to each item using the Priority column. While she’s at it, she decides to enter, in the Cost column, some budget figures associated with those same items.

Items with associated information entered in columns



Column Types

Column types provide a way to simplify entry and formatting of different types of values, such as dates, numbers, text, and pop-up lists. Pop-up lists let you define a list of values and then associate values from that list with items. In the example above, Hanna inserted a pop-up list column (Priority) and a number column (Cost).

Using the Insert Column command, Hanna could also insert a date column for storing the due dates of each task. Entering dates in a date column is simple using the Date Settings dialog box. When Hanna enters dates for her tasks, those tasks will also appear on the appropriate dates of her Calendar.

Anatomy of a Column

Columns, which are made up of individual cells, appear in the *column pane*, a special area at the right side of every ECCO view. To view the column pane, from the Column menu, choose the Show Columns command.

Cell: A cell can contain a value, such as a date, checkmark, text, or number.

Column headings: The title of the column, which you supply when you create a column.

Column scrolling buttons: If the pane contains more columns than can be displayed at one time, use the column scrolling buttons to view them.

Column menu: Contains commands for hiding, displaying, inserting, or deleting columns; modifying column properties; naming, aligning, moving, or sizing columns; and making the contents of a column public.

Pane border: Drag this border to resize the column pane.

Column Types: An Overview

When you create a column, you must specify its *type*. The type dictates the kind of information a column will contain. Six types are possible:

- **Checkmark columns** let you to click column cells to checkmark items.
- **Text columns** contain miscellaneous text.
- **Number columns** contain numerical information.
- **Date columns** contain date and time information.
- **Pop-up list columns** let you choose a value from a user-defined list.
- **Gantt columns** let you represent date ranges graphically, as a bar.

For detailed information on each of these column types, see “About Column Types” later in this chapter.

Using Columns

Inserting Columns

A column displays the contents of an existing folder or allows you to enter new information. Each view can include up to 100 columns (and your ECCO file can include a combination of up to 64,000 folders and columns).

To insert a column with new content

1. From the Column menu, choose Insert Column.
2. From the Insert Column submenu, choose the type of column you want to add.
3. In the Column Heading dialog box, supply a name for the column, and then choose the OK button.

Note: When you insert a column with new content, ECCO creates a folder with the same name as the column. This folder contains the items that have values in the column.

To insert an existing column or folder

Use the Insert Column command to insert a column or folder that was created in another view. For example, you might want to use the Start Dates column in several different Notepads. To add an existing folder or column to the view, follow these steps:

1. From the Column menu, choose Insert Column, and then choose Existing Column Or Folder.

   The Insert Folder Columns dialog box appears.
2. Select one or more columns from the list.
3. Choose the OK button.

Note: You can also insert a single folder column by dragging a folder from the folder window into the column pane.

Entering Values in Columns

When you enter a value in a column, the item associated with it is added to the folder that has the same name as the column.

To enter a value in a column

1. If the column pane is not displayed, choose the Show Columns command from the Column menu.
2. Find the desired column. Use the column scrolling buttons as necessary.
3. Using the mouse or the arrow keys, select the desired cell.
4. Enter a value in the value edit box.
5. Choose the ENT (checkmark) button or press the ENTER key.

Editing and Deleting Values in Columns

When you delete a value, the value and the item associated with it are deleted from the column and from the folder that has the same name as the column.

To edit or delete a value

1. Use the mouse or the arrow keys to select a cell, and then press the ENTER key.
2. In the value edit box that appears, make changes to the value, or press the DELETE key to delete the value.
3. When you are finished, choose the ENT (checkmark) button.

Removing Columns from the View

To remove a column, select a cell in the column, and choose the Remove Column command from the Column menu.

Note: This procedure removes the column and its values from the view; but it does *not* delete them from the file. They still exist in the corresponding folder in the folder window. To redisplay the column and its values, drag the folder into the column pane. To delete the column entirely from the file, delete it from the folder window.

Customizations

Using a variety of commands and techniques, you can customize the appearance of ECCO columns and the ECCO column pane.

Customizing the Column Pane

With ECCO you can customize the appearance of the column pane to best suit your needs:

- To display or hide the column pane, choose the Show Columns command from the Column menu.
- To adjust the width of the column pane, use the mouse to drag the left border of the pane.

Customizing Columns

ECCO also lets you customize the appearance of individual columns. Use the procedures listed in the following table:

To	[Menu] and Command	Mouse Procedure
Change column width	[Column] Width	Drag border of column heading
Move a column	[Column] Move Column	Drag column heading
Minimize or restore a column	[Column] Width (Use the Minimize checkbox in the Column Width dialog box)	Double-click column heading
Change column's character formatting	[Format] command	Right-click in column, then choose Character
Change alignment	[Column] Alignment	
Change a column heading	[Column] Heading	

Note: Formatting attributes and styles applied to a column override outline styles. For more information on formatting, see the chapter or online help on "Working with Items and Formatting."

About Column Types

Earlier in the chapter, you learned a little about the six column types in ECCO. The following sections describe each of these column types in greater detail.

Checkmark Columns

Checkmark columns have no values associated with them. By selecting a cell in a checkmark column, you add a checkmark to the cell and add the item on that line to the folder that has the same name as the column.

Note: To customize the appearance of the checkmark, choose Properties from the Column menu.

Text Columns

Text columns let you associate text with a single item.

If you select a cell in a text column, ECCO displays an empty, sizable, value edit box that can hold up to 32,000 text characters. If you type more characters than will fit in the box, the text scrolls up so that you can continue to enter your value.

- Press CTRL+ENTER to insert carriage returns in the text.
- To expand the borders of the value edit box, drag them.
- When you finish entering text, press the ENTER key. The edit box disappears, and ECCO displays only the amount of text that can fit into the on-screen cell.

Note: When you *print* columns, you'll see only the amount of text that fits into the on-screen cell. Therefore, if you plan to use and print lengthy text values, you should use outline notes instead of columns to ensure that you see all of your material.

Number Columns

Number columns let you associate numbers with items.

If you select a cell in a number column, ECCO displays an empty value edit box. Type any number in this box. Nonnumeric values will not be accepted. Press the ENTER key when you're done.

Date Columns

Date columns let you associate dates with items. By giving an item a date value, you integrate it with the rest of your schedule.

Unless you specify otherwise, all items with date values appear in the Tickler section of the Calendar. If you associate a time as well as a date with the item, the item also appears in the Appointment section of the Calendar view.

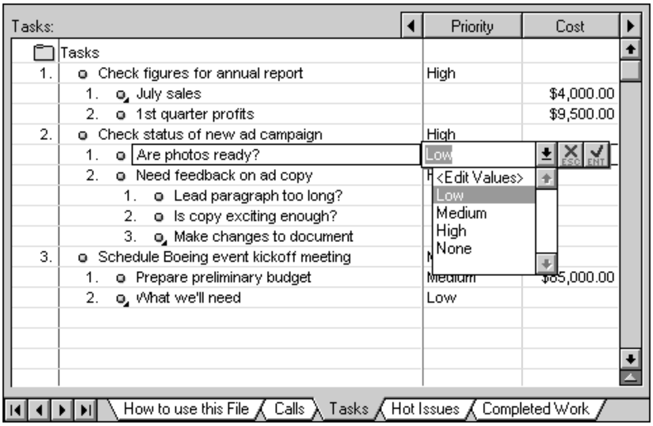
When you select a cell in a date column, ECCO displays an empty value edit box in which you can type the date. (Or choose the down arrow to display the Date Settings dialog box. Use the dialog box to set the date, together with any other date attributes.)

Note: Values in the date column can have all the attributes of dates in the Calendar. For more information, see the chapter or online help on “The Calendar.”

ECCO has several default date folders, such as Start Dates and To-Do’s, that you can use. For more information, see the chapter or online help on “Folders.”

Pop-up List Columns

With pop-up list columns you select a cell value from a pre-established list. A pop-up list allows you to choose a value from a user-defined, editable list.



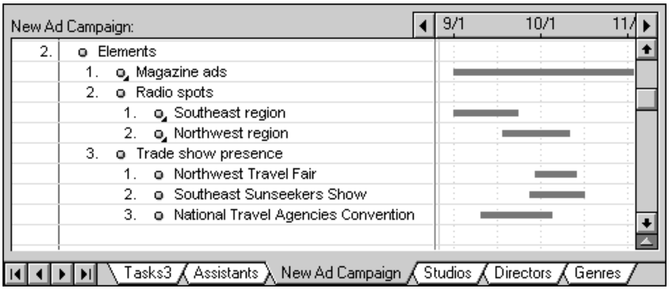
If you select a cell in a pop-up list column, ECCO displays a value edit box. In this box you can

- Choose the down arrow to display a list of existing values (and then select a value from the list).
- Type a new value.
- Select Edit Values to display the Pop-Up List Column Values dialog box. In this dialog box, you can add, modify, or delete values in the pop-up list column. For more information, see the chapter or online help on “Folders.”

Gantt Columns

In a Gantt column, time values are displayed in graphic form as a bar.

A Gantt column



Creating a Gantt Column

An item's start and end dates define the length of its bar in the Gantt column.

To create a Gantt Column

To create a Gantt column, do the following:

1. From the Column menu, choose Insert Column, and then choose Gantt. ECCO displays the Create New Gantt Column dialog box.

2. In the Chart Range boxes, specify the date range for the chart.

   By default, ECCO uses today's date as the starting date and 90 days from today as the ending date. In either value edit box, you can choose the down arrow to select a date from the calendar.

3. From the drop-down list of date folders, select folders whose names best describe the beginning and end of each bar (for example, Start Date and End Date).

4. Choose a bar color from the Bar Color list.

5. Choose the OK button.

   ECCO displays the column without a heading. If you drag the right column boundary to the right, ECCO displays dates, in the date range you specified, across the top of the column. ECCO spaces the dates proportionate to the total space you have allotted to the column.

Note: A Gantt column does not create a folder.

To add bars to a Gantt column

1. In the Gantt column, choose the desired cell.

   If you have not added date values to this item in the date folders specified for the chart, ECCO displays a value edit box in which you can enter the starting and ending dates.

2. Type the dates, or choose the down arrow button to display the Date Settings dialog box and select the dates.

3. Press the ENTER key.

Customizing Gantt Columns

Once they're created, Gantt columns can be easily changed:

- To change the date range, the folders from which values are taken, or the color of the bars, select the desired cell, choose Properties from the Column menu, and then make the necessary changes.
- To change dates, choose the desired cell and change the date in the value edit box (or change the value elsewhere in ECCO). If the new date falls outside the date range specified for the Gantt chart, the bar will not appear in the chart.
- To change the width of the chart, resize the column. Drag it to the desired width or choose Width from the Column menu.

Viewing Folder Contents in a Column

To view a folder's contents as a column, use one of the following procedures:

- Drag a folder from the folder window into the column pane.
- From the Insert Column submenu, choose Existing Column, and then choose from the list.

Calculating Values in Columns

ECCO's Sum feature allows you to calculate totals in your columnar data or multiply and total one column's values with those of another.

For example, you can:

- Determine how many items have been selected with a checkmark.
- Add all or some of the values in a column.
- Multiply and total the hours spent on a project by a selected rate.

Calculating Totals and Sums

ECCO can perform math calculations on almost every column type. Gantt and text columns are the exceptions.

Columns are evaluated in the following ways:

- **Checkmark columns** produce a count of all items that have been marked. Blank cells are treated as zeros.
- **Appointment and Date columns** total hours and minutes. If the column contains only a date and no times, its value is considered to be zero. For example, the sum of all values in the Done column will be zero.
- **Other column types**, such as Number, Pop-Up List, and Text columns, will add or multiply only those entries that are numbers. With Pop-Up List columns, you can total a list of frequently used numbers (such as hours worked or interest rates) or use them to perform calculations on other columns. Non-numeric values are treated as zeros.

To total a column

1. If you want to total specific items in a column, select them.
2. From the Tools menu, choose Sum.

   The Calculate Sum dialog box appears.
3. Select the Sum The Value Of option, and then choose a column from the drop-down list.
4. Choose the Calculate button.

   The total will appear beside Results.
5. Choose Close when you are done.

To multiply and then total two columns

1. If you want to perform the calculation on specific items, select them.
2. From the Tools menu, choose Sum. The Calculate Sum dialog box appears.
3. Select the For Each Item Multiply option, and then choose the two columns you want to multiply from the drop-down lists.
4. Choose the Calculate button.

   ECCO will first multiply each item’s entry in each column together and will then add the answers for the final total. The sum will appear beside Results.
5. Choose Close when you are done.

Creating Standard Column Sets

ECCO gives you the option of creating standard column sets that will appear as part of every newly created Notepad.

To include a column in a standard column set

1. Select a cell in the desired column.

2. From the Column menu, choose Properties.

   The Column Properties dialog box appears.

3. Select the Include This Column In New Notepads By Default checkbox.

Sorting by Column Value

You can sort the items in a view by their column value. For example, suppose you want to sort the items in your Tasks notepad chronologically by due date. Using the Due Dates column, you can sort the items in ascending order so that those items with the earliest due dates are at the top of the list.

Note: When you sort items in a pop-up list column, the sort is based on the position of the values in the list. You can modify this order at any time by choosing Edit Values from the list.

For detailed instructions on sorting, see the chapter or online help on "Working With Items and Formatting."

Making Columns Public

If you share an ECCO file with others over a network, all columns in shared (or public) views are automatically made public. New columns added *after* the share remain private, however, until you explicitly share them.

To share a column

1. Select a cell in the column you want to share.

2. From the Column menu, choose Make Public.

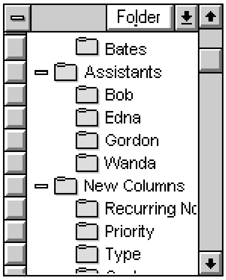
Using Multiple-Folder Columns

Although a column typically displays the values for a single folder, it's possible to have a column show values from several folders. This can be useful when only a few (of many) folders are likely to be used with each item in a view. Setting up columns for multiple folders is also useful for working with items that have multiple values or folder assignments that you want to view and edit in one place.

For example, Hanna has a folder for each of her assistants. As tasks come up that need to be attended to, Hanna can assign them to her assistants by adding them to folders. Hanna would like to see at a glance which tasks are in which folders without having to dedicate a column to each of her assistants.

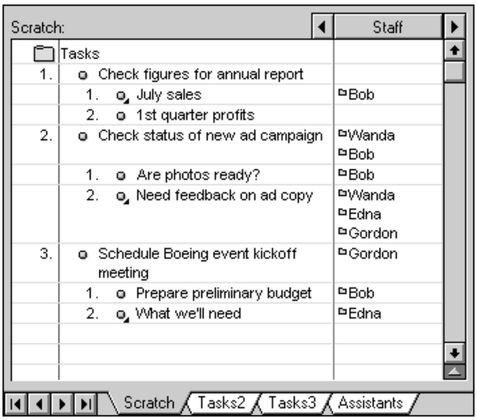
In the folder window, Hanna creates a folder called "Assistants" and makes a folder for each of her assistants subordinate to that folder.

The Assistants folder with four subordinate folders



She then creates a multiple-folder column using the "Assistants" column. For each task in the Notepad, those subordinate folders that contain the item will be displayed in the corresponding cell of this column.

A multiple-folder column



Note the following about multiple-folder columns:

- If an item in the view has been added to a subfolder, the folder's name appears in the multiple-folder column cell to its right.
- If the folder contains a value, the value appears along with the folder name.
- You can add, delete, or edit the values in each subfolder by clicking the column cell.
- You can include folders without values in a multiple-folder column, and you can use the column to view folder assignments, add items to folders, and remove items from folders quickly, in a single location.

Displaying Multiple Folders in a Column

You can display the subfolders of a folder in a single cell of a column.

To display multiple folders in a column

1. In the folder window, arrange a group of folders as subfolders of a single folder. For more information about organizing folders in the folder window, see the chapter or online help on "Folders."

   For example, you might make "Date 1," "Date 2," and "Date 3" subfolders of a "Project Dates" folder.

2. In the column pane, insert a folder column for the folder to which the group of folders is subordinate.

   To extend the preceding example, you would insert a folder column based on the Project Dates folder.

3. With the column selected, from the Column menu, choose Properties.

   The Column Properties dialog box appears.

4. In the For Each Item, Cell Displays area of the Properties dialog box, select the Sub Folders Of <Folder Name> That Contain Item option.

5. Choose the OK button.

   When you add an item in the view to one of the subfolders, the folder's name appears in the column cell on the same line as the item.

Editing Multiple Folders in a Column

To change values and folder assignments in a multiple-folder column, click on a column cell and make changes in the box that appears.

To edit the cells of a multiple-folder column

1. Click a column cell, or select the cell and then press the ENTER key. ECCO displays a box listing all folders subordinate to the folder heading the column, together with the value assigned to the item for each folder.

2. Click the subfolder you want to edit, or select the folder, and then press ALT+S. ECCO displays a value edit box appropriate for the folder type. If the folder is a checkmark folder, click the folder name to "check" or "exclude" it.

3. Enter a value or edit the existing value.

   To remove the item from that folder, delete the value. If the folder is a checkmark folder, click the folder name to add or remove the item from that folder.

4. When you have finished editing folder values, do one of the following:

   - To save the changes you have made, choose the ENT button (checkmark) in the upper right corner of the edit box.
   - To close the edit box without saving the changes you have made, choose the ESC button (it looks like the letter "X").

Chapter 13. Forms

If your work involves adding items to multiple folders or if you frequently update folder values for a large number of items, you can automate these tasks by using ECCO *forms*.

A form isn't a visible part of ECCO. It's a template that lists a set of folders and folder values that can be applied to an item.

To create and work with forms, you use the following commands on the Tools menu:

- **New Form** lets you create and define a form.
- **Manage Forms** lets you structure the form submenu (part of the Tools menu).
- **Add Item By Form** lets you create a new item and give it a specific set of values.
- **View Item By Form** displays (and allows you to change) an item's values.

  Note: For more information, see the section on Folders in the User's Guide or in online Help.

- **Apply Form To Items** lets you associate existing text with a specific set of values.

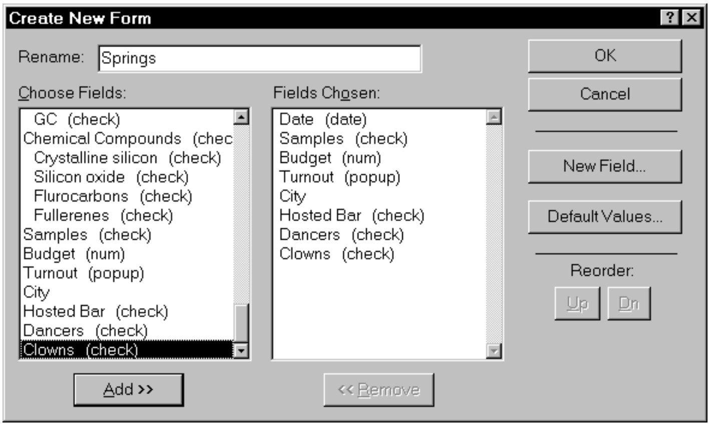
Using Forms: A Practical Example

Petrie's Beverages, Inc. has hired Hanna Jay to organize a nationwide launch for *Chameleon Springs Sparkling Waters,* its new line of carbonated beverages. Petrie's has selected shopping centers across the country to host the launch, and each store will have its own activities. Hanna needs to keep track of the planning process on a nationwide basis. To streamline the collection of data, Hanna decides to create a form called *Springs* which will let her work with her data in a useful way.

First, she must decide what fields (and default values, if any) will be associated with the form. For more information on the types of fields that are available, see the chapter or online help on "Folders." She decides that, for the Scents form, the following fields best suit her needs:

- A text field titled *City* that lists the store's location (no default value).
- A pop-up list folder titled *Turnout* that lists the projected degree of customer attendance at the event (Low, Medium, or the default, High).
- A number field titled *Budget* that lists the projected total expenses for the event on a per-store basis ($5,000 default value).
- Checkmark fields listing party details that need to be taken care of (default is *unchecked*).
- A date field that lists the date that the event is to occur (no default).

The Create New Form dialog box



Once Hanna created the Springs form, she used it in several different ways:

- Whenever she planned an event in a new city, she created a new item with the Add Item By Form command.
- She applied the Springs form to a list of selected stores already listed in ECCO by using the Apply Form To Items command.
- Whenever she needed to change data on a particular store, she used the View Items By Form command.

The following sections describe each of the steps involved in creating and using forms.

Note: As you learn about forms, keep in mind that three terms are interchangeable: folders=fields=columns.

Creating a New Form

The first step in working with forms is the actual creation of a form.

To create a new form

1. From the Tools menu, choose New Form.

   The Create New Form dialog box appears.

2. In the Rename box, type a name for the form. This name will appear in a submenu whenever you choose any form command.

3. From the Choose Fields list, select the fields you want to add to the form. To create a new field, choose the New Field button. The field names appear in the Fields Chosen list as you add them.

To enter a default value for a field, click the Default Values button and then enter a value in the Set Default Values For Form dialog box.

Note: Specify default values for those fields that have a standard value that changes infrequently, if ever.

4. Choose the OK button.

Adding Items by Form

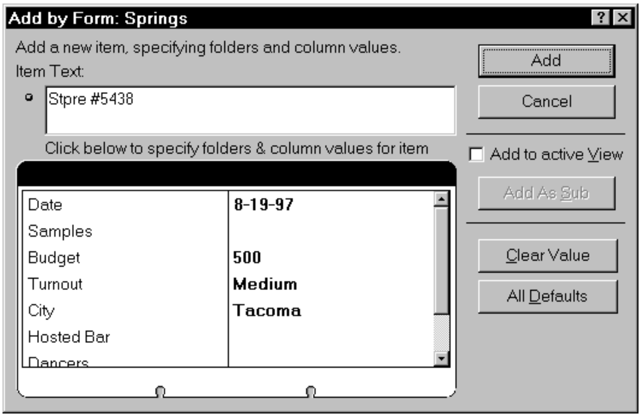
Once you've created a form, you can use it within ECCO to add new items

For example, using the Springs form, Hanna added an item for the Tacoma store, and as she did so, she customized the default information:

- She specified the City as *Tacoma*.
- She changed the default Turnout value to *Medium* (since the Tacoma store is smaller than the average store).

The default values for the Budget, party details, and date fields required no change.

You can change default field values when you add a new item by form.



Note: To add items by form from other programs, use the Shooter. For more information, see the chapter or online help on "Importing and Exporting."

To add a new item by form

1. From the Tools menu, choose Add Item by Form, and then choose the desired form from the menu.
2. The Add by Form dialog box appears, listing the fields associated with the form.
3. In the Item Text box, type the item you want to add.
4. Customize the fields as desired:

- To set or change a field value, double-click the field name in the list on the left, and then enter a value in the field on the right.
- To reset all values to the default, choose the All Defaults button.
- To exclude the new item from a listed field, highlight the field value, and then choose the Clear Value button.

5. To add the new item below the selected item in the active view, select the Add To Active View checkbox.

6. To add the item, do one of the following:

   - To add the item and close the dialog box, choose the Add button.
   - To add the item and continue adding other items, choose one of the Add & Continue buttons. You can then add subsequent items equal to or to the right of the item just added.

Applying Forms to Items

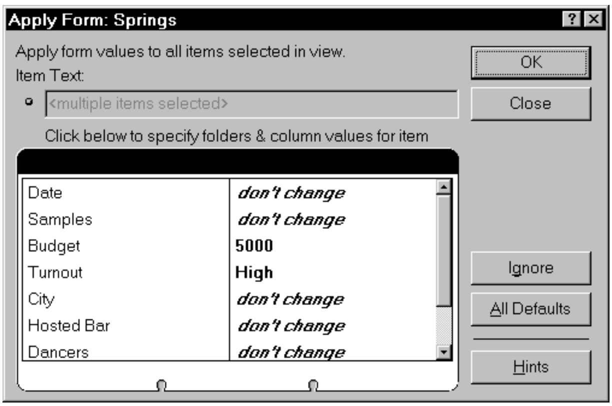
To apply an existing form to existing items, use the Apply Form To Items command.

Because Hanna had an existing list of flagship stores, she applied the Springs form to these items just to ensure that all of her information was in parallel form.

To apply a form to items

1. Select the item(s) to which you want to apply the form.

2. From the Tools menu, choose Apply Form to Items, and then choose the form you want to apply.



3. Customize the folder list as desired:

   - To set or change a field value, double-click the field name in the list on the left, and then enter a value in the list on the right.

- To reset all values to the default, choose the All Defaults button.
- To exclude the item text (the selected item in the view) from a listed field, highlight the folder value, and then choose the Ignore button.

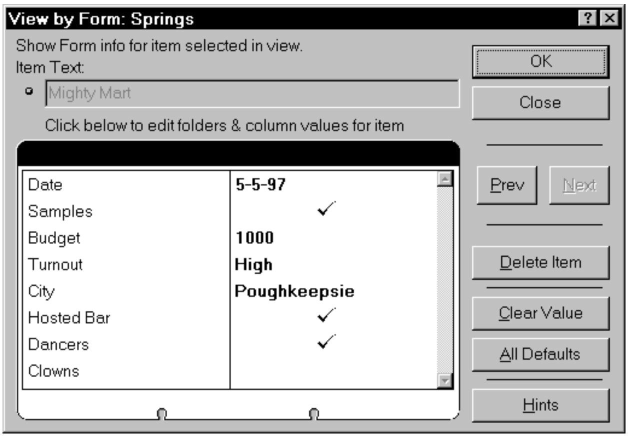
4. Choose the OK button.

Viewing Items by Form

The View Item By Form command lets you examine an item in relation to an existing form. You can

- See and change the item's field values.
- Add or remove the item from a field on the form.

For example, when Petrie's suddenly decided to cut back its promotions budget for Mighty Mart in Poughkeepsie, Hanna used the View Items By Form command to view the information for Mighty Mart, to change the value of the *Budget* field to $1000, and to exclude clowns from the party details checklist.



To view an item's fields

1. Select the item whose fields you want to view.

   From the Tools menu, choose View Item by Form, and then choose the form by which you want to view the item. The View by Form dialog box appears, listing the text of the selected item, the folders associated with the form, and the fields.

2. Customize the folder list as desired:

   - To set or change a field value, double-click the field name in the list on the left, and then enter a value in the list on the right.
   - To reset all field values to the default, choose the All Defaults button.

- To exclude the item text (the selected item in the active view) from a field in the field list, highlight the field value, and then choose the Clear Value button.
- To delete the item text (the selected item in the active view) from all fields, choose the Delete Item button.

3. Conclude the changes or proceed:

- If you are done making changes, choose the OK or Done button.

Note: The Done button becomes an OK button if you make changes in the dialog box.

- To exit the View By Form dialog box without saving changes to the selected item, choose the Close button.
- To view fields for the previous or next items in the view, choose either the Prev or the Next button.

Note: If you choose to view fields for another item at this time, you will be unable to undo the changes you have just made. Close is valid only for the currently selected item.

4. Repeat Step 3 as desired.

Managing Multiple Forms

With the Manage Forms dialog box you can edit or rename existing forms, delete forms, reorder forms on the menu, or make forms public.

To manage forms

1. From the Tools menu, choose Manage Forms. The Manage Forms dialog box appears.
2. Take one or more of the following actions:

- To rename a form, select it, and then type the new name in the Rename box.
- To create a new form, choose the New button.
- To edit a form, select it, and then choose the Edit button.
- To delete forms, select them and then choose the Delete button.
- To reorder forms on the menu, select them, and then choose either the Up button or the Dn button.
- To make forms public, select them, and then select the Make Public checkbox in the lower-right corner of the dialog box. For more information, see the chapter or online help on “File Sharing.”

3. When you have finished making changes, choose the OK button.

Chapter 14. Other ECCO Features

At this point, you know how to make full use of ECCO to collect items of information, cross-reference them, and associate values with them. But perhaps you're worried that you have too much of a good thing. You need a way to narrow and order the information you're viewing—a way to focus on a particular situation or set of circumstances.

A *filter* can help you. By using a filter, you can display only those items that meet certain search criteria.

You can use filters in a variety of ways, as shown in the following examples.

Let's say you're planning your work week and you want to know which outstanding issues you need to tackle first. In your Priority column you've added values indicating the priority of the Tasks folder's items.

Pop-up values indicate the priority of your tasks

Tasks:	Priority	Cost
Tasks		
I. Check status of new ad campaign	High	
A. Are photos ready?		
1. Proofing	Medium	
2. Backups?	Low	
B. Need feedback on ad copy	High	
1. Lead paragraph too long?		
2. Is copy exciting enough?		
3. Make changes to document		
II. Check figures for annual report	High	
A. July sales		$4,000.00
1. Compare to previous month	Low	
2. Compare to July 1994 (w/ graph)	Medium	
3. Contribution to Qtrly profits	High	
B. 1st quarter profits		$9,500.00
III. Schedule Boeing event kickoff meeting	Medium	
A. Prepare preliminary budget	Medium	$85,000.00
B. What we'll need	Low	

You can create a filter to display only those items with a priority of *High*.

A filtered view based on the Priority column

Tasks:	Priority	Cost
Tasks		
I. Check status of new ad campaign	High	
A. Are photos ready?		
B. Need feedback on ad copy	High	
II. Check figures for annual report	High	
A. July sales		$4,000.00
B. 1st quarter profits		$9,500.00

Or let's say you're taking a trip to San Francisco and want to print a list of the telephone numbers of your clients living there.

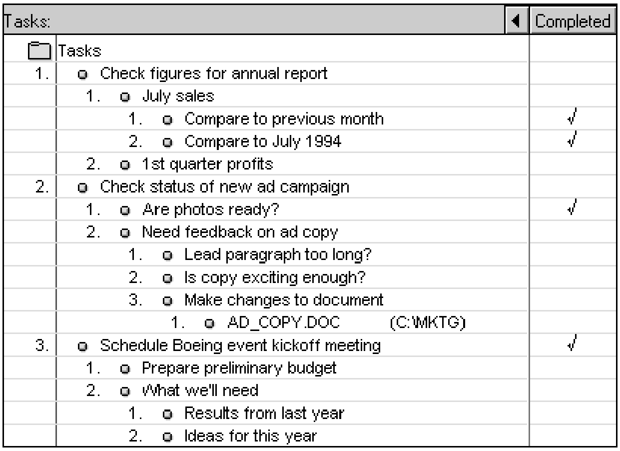
A PhoneBook view before applying a filter

In the PhoneBook, you could apply a filter to display only those names with a city value of *San Francisco*.

A filtered view based on the City column

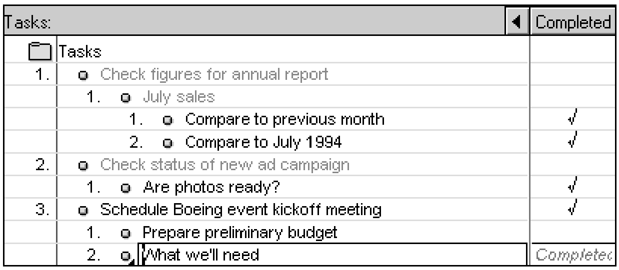
Perhaps you're cleaning up your list from the Tasks folder and want to know which ones are completed. As you've completed tasks, you've added the date to your Completed column.

A Completed column indicating completed tasks



You can create a filter to display only those items in the Tasks folder that are included in the Completed column.

A filtered view based on the Completed column

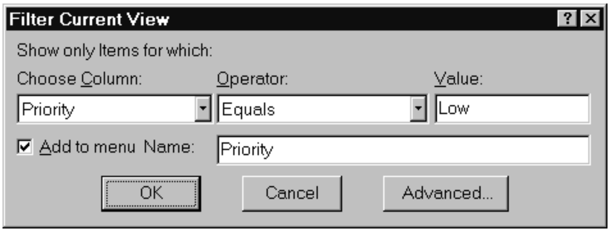


Creating Filters

You can create a simple filter based on any column displayed in a view (the column must contain at least one value). You can also select an operator, such as “Has any value” or “Equals,” that specifies the type of comparison to be made.

For example, if you want a Priority column to display only those items with a low priority value, in the dialog box you would select *Priority* from the list of columns, select *Equals* from the list of operators, and type or select *Low* as the value.

Create a single column filter



To create a simple filter be sure that some values or checkmarks have already been entered in the column for which you are creating the filter.

1. From the Tools menu, choose Filter view.

   A menu of filter commands appear.

2. Choose New.

   The Filter Current View dialog box appears.

3. From the Choose Column list, select the column whose values you want to filter. ECCO includes in the list all columns currently in the active view.

4. From the Operator list, select one of the available operators. The list of available operators changes according to the column type.

5. In the Value box, type the value upon which the filter is to be based or use the default value. The value must be appropriate for the column type. For example, if the column type is Number, then the value you enter must be a number.

6. To add the filter name to the Filter View submenu and save it for future use, choose the Add To Menu option and type a name for the filter.

7. ECCO displays the new filter name on the Filter View submenu. The filter is then available in any ECCO view as well as from the Find command. For more information about finding items, see the section on Working With Items and Formatting in the User’s Guide or in online Help.

8. Choose the OK button.

9. ECCO immediately applies the filter to the view currently active. Only the items whose values meet the specified criteria are displayed (in addition to those parent items necessary to provide context, displayed in green). The status bar displays the message “Filter: *filtername*.”

   Note: When you name a filter, it appears as a command on the Filter View submenu If you want, you can add your new filter to the toolbar. For more information, see the chapter or online help on “Using the Toolbar.”

Applying Filters

When you create a filter, the filter is applied immediately to the items in the active view. ECCO displays only the items whose values meet the specified criteria, along with their subitems (in a Notepad, parent items necessary to show the context also appear, displayed in green).

You can apply only one filter at a time to the items displayed in a single view. The filter remains active until you either choose Ignore Filter from the Filter View submenu, create a new filter, or apply an existing named filter.

When a filter is active, the status bar displays the message "Filter: *filtername*." When you choose Ignore Filter, the message disappears and all the items in the view reappear.

Note: When a filter is active and you add a new item that does not meet the criteria, the item is displayed in green until the filter is deactivated.

Applying Filters in the Calendar

The Calendar acts as a kind of date filter in that it displays tickler items and appointments for only the date, week, or month you choose. However, you might want to further limit the items displayed in your Calendar. For example, you could filter out all but the "High" priority items from the view.

Filters applied to the Calendar affect the entire view, not just the date or date range currently displayed. In the Calendar, only tickler items and appointments that meet the filter criteria are shown, regardless of whether or not their subitems meet the criteria.

Applying Filters in the PhoneBook

When you initially apply a filter to the PhoneBook, ECCO will display any item in the PhoneBook that meets the filter criteria. If you click a letter tab, only items that meet the filter criteria *and* begin with that letter are displayed. When you search for text, the filter is applied to that search as well. If a name is displayed in the entry form, that name disappears if it does not meet the filter criteria.

In the PhoneBook, only names that meet the criteria are shown, regardless of whether or not their subitems meet the filter criteria.

When a filter is active in the PhoneBook and you add a new name, that name appears only if it meets the filter criteria.

Applying Filters in a Notepad

When you apply a filter to a Notepad, only those items meeting the filter criteria are displayed in the view, along with their subitems. If the items are subordinate to items that do not meet the criteria, the parent items appear as well and are displayed in green (that is, they appear as context parents). For more information about context parents, see the chapter or online help on "Folders."

Using Named Filters

You can name and save for later use any ECCO filter you create. To name a filter, create a new filter, choose the Add To Menu option in the Filter Current View dialog box (or in the Create A New Filter dialog box) and type a name for the filter. The filter name appears on the Filter View submenu, where it is available at any time from any view.

If you name and save a filter, you can:

- Retain the specifications of the filter for future use.
- Add the filter name to the Filter View submenu from which it can be used in any view.
- Apply the filter to items in any view.
- Add a toolbar button for the filter. For more information, see the section on Using the Toolbar in the User's Guide or in online Help.

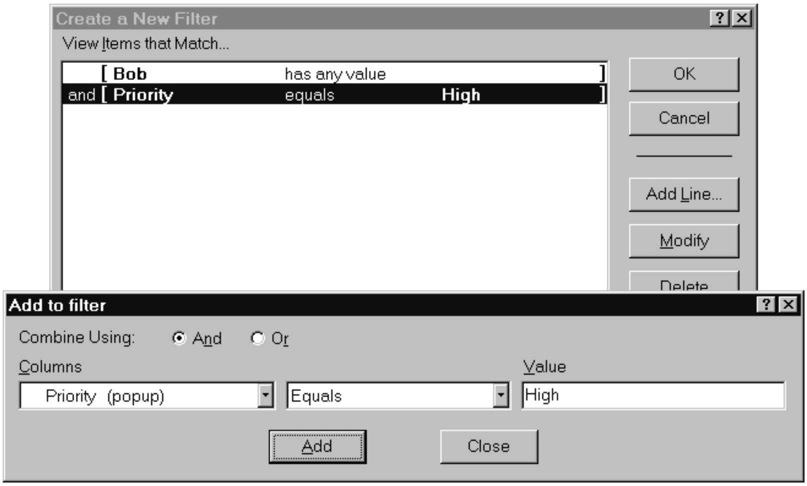
If you create a filter but do not name and save it, you can use it only in the current view. Should you switch to or create another filter, the specifications of the original will disappear and not be retained by ECCO.

Advanced Filters

You can also create an advanced filter that has multiple sets of criteria. This criteria must be fulfilled before an item can appear in the filtered view.

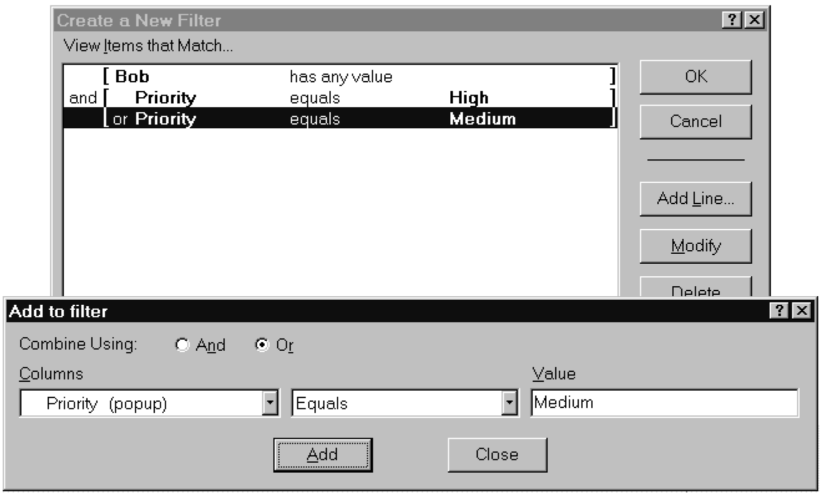
For example, let's say you're supervising a team of consultants and want to ensure that Bob, the new hire, is working on his most important assignments. You could show the team's task list in a Notepad and create a filter to display those items that meet two sets of criteria: items that 1) are in Bob's folder and 2) have a value of *High*.

A filter based on multiple criteria



But as Bob has so few high-priority assignments, you decide to display the medium-priority assignments as well. To do so, you would modify the filter to display items in Bob's folder that have a value of *High* or *Medium*.

A filter based on AND and OR criteria

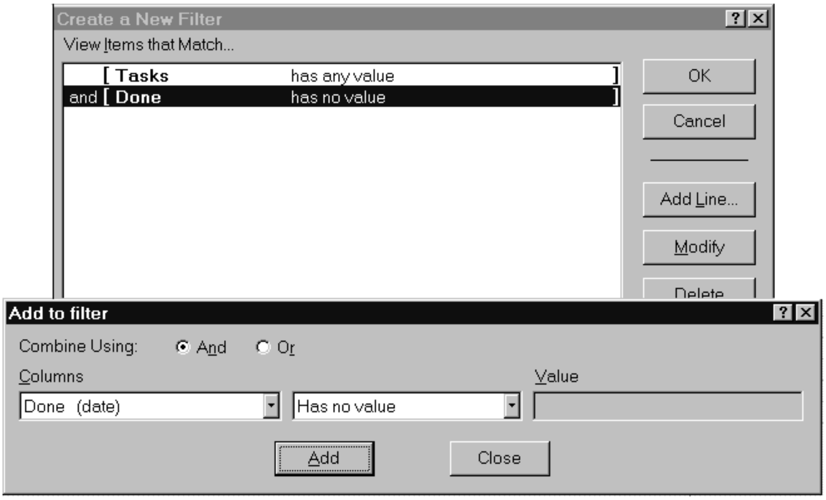


By default, ECCO treats subitems of an item that match as a specific line of criteria as though the subitems meet the criteria as well.

For example, you might want to know which of your daily tasks are still uncompleted. You have your daily task list in the Tasks Notepad, and as you complete tasks, you add them to your Done folder.

In the Create a New Filter dialog box, you could create a filter specifying that the items displayed are included in the Tasks folder and not included in the Done folder.

Creating a filter based on the Tasks and Done folders



When you apply the filter, only your uncompleted tasks will be displayed in the Tasks folder.

Note: If you used the Create a New Filter dialog box to create the current filter, when you subsequently choose New from the Filters menu, ECCO will display the current filter in the same dialog box. To return to the Filter Current View dialog box, choose the Simple button.

Creating Advanced Filters

To create an advanced filter, use the Advanced button in the Filter Current View dialog box.

To create an advanced filter

1. From the Tools menu, choose Filter View, and then choose New.

   The Filter Current View dialog box appears.

2. Choose the Advanced button.

   The Add To Filter dialog box appears on top of the Create a New Filter dialog box.

3. From the Columns list, select the first column upon which you want to filter.

4. From the Operator list, select one of the available operators (the list of available operators changes according to the column type).

5. In the Value box, type the value on which the filter is to be based or use the default value.

6. Choose the Add button.

7. ECCO adds the first set of criteria to the Create a New Filter dialog box.

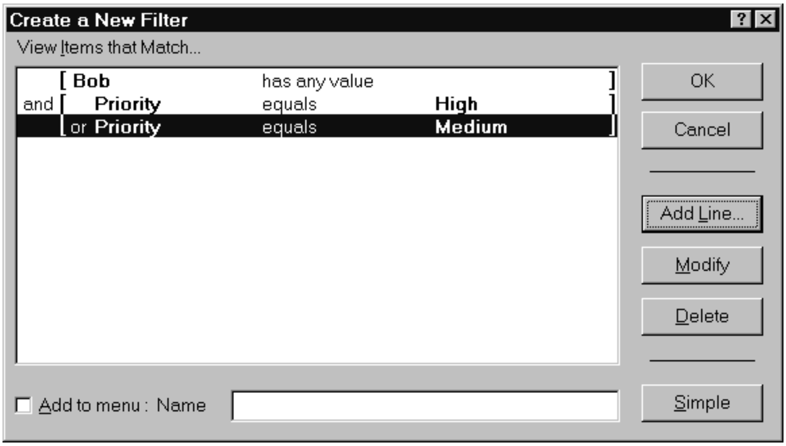
8. Under Combine Using, do one of the following:

   - Select the *And* option if you want items to meet all sets of criteria.
   - Select the *Or* option if you want items to meet only one set of criteria.
   - Add a second set of criteria and choose the Add button.

9. Repeat steps 4 through 6 to add additional sets of criteria. Before each set of criteria, be sure to select either the And or Or option accordingly.

10. When you are done specifying sets of criteria, choose the Done button.

    ECCO displays the Create a New Filter dialog box in which you can view all the criteria for the specified filter.



11. To add the filter to the Filter View submenu, select the Add to Menu checkbox and then type a name for the filter in the Name box.

12. To modify one of the sets of filter criteria, select that set in the list, and then choose the Modify button.

13. To delete one of the sets of filter criteria, select that set in the list, and then choose the Delete button.

14. When you have customized the filter to your satisfaction, choose the OK button.

ECCO immediately applies the filter to the currently active view. Only the items meeting the criteria specified are displayed. The status bar displays the message "Filter: *filtername*."

Managing Filters

ECCO lets you edit or rename existing named filters, delete named filters, or reorder named filters on the Filter View submenu. You can perform all these tasks from the Manage Named Filters dialog box.

To manage named filters

1. From the Tools menu, choose Filter View, and then choose Manage.
2. ECCO displays the Manage Named Filters dialog box.
3. Take one or more of the following actions:
   - To rename a filter, select its name from the list box and then change the name in the Rename text box.
   - To create a new filter, choose the New button. The Create a New Filter dialog box appears in which you can design a new filter.
   - To edit a filter, select its name from the list box and then choose the Edit button. The Edit a Named Filter dialog box appears in which you can make the desired changes.
   - To delete a named filter, select its name from the list box, and then choose the Delete button. This action deletes the filter from all views.
   - To reorder named filters on the Filter View submenu, select the names of the filter(s) you want to move, and then choose either the Up or Dn reorder button.
4. When you have finished, choose the OK button.

Finding Information with Filters

In addition to using a filter to limit the amount of information displayed, you can use a filter to find items. For more information about finding items, see the section on Working with Items and Formatting in the User's Guide or in online Help.

To find items using a filter

1. From the Edit menu, choose Find.

   The Find dialog box appears.

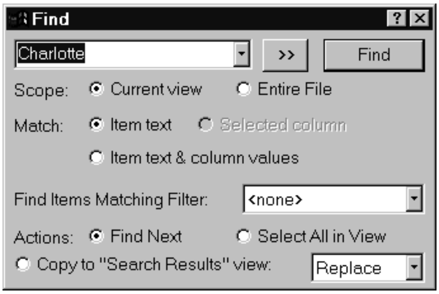
2. In the Find box, type the text you want to find.

   Or

   To use a filter without specifying search text, press the DEL key to clear the highlighted text.

3. Choose the Unfold button (>>) to expand the Find dialog box.

   The Find dialog box expands, displaying additional options.



4. In the Find Items Matching Filter box, select an existing filter, or select the Custom option and create a filter.

5. Specify additional search options. For more information, see the chapter or online help on “Working With Items and Formatting.”

Tracking Time and Expenses

Time and Expense Billing gives you an organized way of tracking and calculating your costs, hours, and expenses. You can

- Set different rates for clients and activities.
- Categorize your expenses for easier bookkeeping.
- Use your billing numbers to track orders and jobs.
- Quickly calculate billings for a particular client or expenses for a particular a time period.

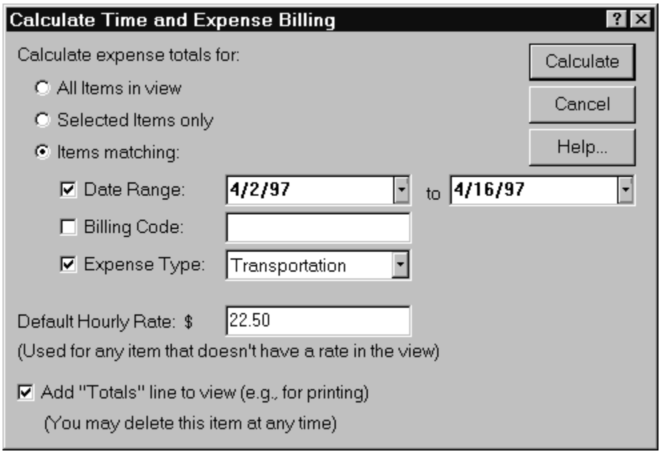
Setting Up Time and Expense Billing

The first time you choose Time & Expenses from the Tools menu, ECCO makes some changes to your ECCO file.

To set up Time and Expense Billing

1. From the Tools menu, choose Time & Expenses.

   The Set Up Time Expense Billing dialog box appears.



2. Choose the OK button. At this time ECCO will:
   - Create a new Notepad called Time & Expenses.
   - Add several new columns and folders to help you track your information.
   - Create a new Expense form to facilitate adding new expense-related items.

About the Time & Expenses Notepad

The Time & Expenses notepad comes equipped with a number of columns designed to streamline the process of tracking your time and expenses:

- **Billing Code** is used for your existing billing codes. It is a text field, so the code can be a combination of letters and numbers. You can supply a Billing Code for a parent item and it will apply to all subordinate items.
- **Billable Hours** are used to enter hours to be billed that aren't tracked in the Phone/Time Log or the Appointments columns. You can specify Billable Hours for any item that has a Phone/Time Log or Appointment time. In that case, ECCO will use the Billable Hours rather than the actual time logged when calculating Expenses.
- **Expense Amount** is used to list expenses that are not calculated at an hourly rate. Examples are the cost of airfare, building materials, or a subcontractor's services.
- **Expense Date** is the date on which expense was incurred. ECCO uses this date, the Phone/Time Log date, or Appointment date when a date range is requested. There is no need to specify Expense Date for an Appointment or Time Logged item.
- **Expense Type** is a pop-up list used to set up different classifications for tracking your expenses regarding billing, bookkeeping, and expense reports. Values can be edited and added at any time.
- **Hourly Rate** allows you to keep the various rates that you charge at your fingertips. It is a pop-up list so you can add and edit values at any time. You specify an hourly rate for an item and that hourly rate will apply to all subordinate items for which

there are Billable Hours, Time Logged, or Appointment settings, provided that no other Billing Rate is supplied for those subitems. If this field is left blank, ECCO will use the default rate specified in the Calculate Time & Expenses dialog box.

The Expenses Due folder can be inserted as a column in other views where billable items are stored. Once you have done so, you can check that column for any item to have it appear in the Time & Expense view. You might want to insert that column in your Calendar, for example, to easily bill expenses on certain appointments. Similarly, you can drag any item from any view into the Expense Due folder in the Folder window. The item will be added to the Time & Expense view.

The Phone/Time Log column from the PhoneBook and the Appointments column from the Calendar are also included since some logged items and appointments might also be billable items or expenses.

Recording an Expense

There are four basic ways to record an expense:

- Record the expense directly in the Time & Expenses Notepad.
- Choose the Expense form from the Add New Item By Form submenu to add new expenses from anywhere inside ECCO.
- Use the Phone Dialer or Time Logger to automatically create a logged item as an expense.
- Use the Expense form from the View Item By Form submenu to specify expenses for any existing ECCO item (such as an appointment, a logged call, or a task item).

Adding Items to the Time & Expenses Notepad

You can add expense items directly to the Time & Expenses notepad.

To add items to the Time & Expenses notepad

1. Switch to the Time & Expense notepad.
2. Enter the name of the expense as an item.
3. Add the appropriate information to the columns in the view.

If you enter an expense as a subordinate item and if the parent item has a billing code and an hourly rate, you would not need to supply either of those for the new expense. The time expense calculation will use those values from the item's parent if the item itself has no values.

Note: You can *override* the Billable Hours or the Expense Amounts for all subordinate items by entering those directly into a parent item. If you've entered Billable Hours or Expense Amounts for both a subitem and its parent item, ECCO will alert you when it calculates expenses that only the parent's value will be used.

To summarize, if you have hourly rates for both a subitem and its parent item, *the subitem values will be used*. If you have Billable Hours or *Expense Amounts* for both a subitem and its parent item, *the parent values will be used*.

Adding New Expenses Using the Expense Form

You can use the Add by Form dialog box to add a new item and record expenses for it.

To add expenses using the Expense form

1. From the Tools menu, choose Add New Item by Form, and then choose Expense.
2. The Add By Form: Expense dialog box appears.
3. In the Item Text box, type a description of the expense.
4. Customize the fields as desired:
   - To set or change a field value, double-click the field name in the list on the left and then enter a value in the field on the right.
   - To reset all values to the default, choose the All Defaults button.
   - To exclude the new item from a listed field, highlight the field value and then choose the Clear Value button.
5. To add the new item below the selected item in the active view, select the Add To Active View checkbox.
6. Choose the Add or the Add as Sub button.

   The expense is automatically recorded in the Time & Expenses notepad.

   If you choose Add as Sub, the new item will be added as a subordinate item to the currently selected item. In that case, if the selected item had a billing code and an hourly rate you would not need to supply either of those to the new expense. The time expense calculation will use the values from the item's parent item.

   Note: You might want to supply billing codes and hourly rates to your PhoneBook entries so that all logged phone calls and other expenses can use those values without requiring re-entry for each new expense.

Using the Time Logger Or Phone Logger

To use the Time or Phone Logger, do the following:

1. From the Tools menu, choose Time Logger.

   Or

   From the PhoneBook menu, choose Dial Phone.

   The Time Logger dialog box or the Dialer/Call Logger dialog box appears.

2. Choose one of the following options to add the logged item:
   - Below the selected item
   - To the Time & Expenses view
   - Below the selected item and to the Time & Expenses view
3. Choose Begin to begin logging
4. When finished, choose the Close button on the Elapsed Time dialog box.
5. Record the appropriate information in the Time & Expenses view.

Note: You do not need to enter billable hours or an expense date for Phone/Time logging. ECCO will use the actual date and time logged for those values. You may specify billable hours if you wish, in which case ECCO will use the billable hours you specify rather than the actual time logged.

Using View Items By Form to Specify Expenses

You can use the View By Form dialog box to record expenses for an existing item.

To add expenses using the Expense form

1. Select any existing item for which you wish to specify expenses (such as an appointment or task item).
2. From the Tools menu, choose View Item By Form, and then choose Expenses.
3. Check the Expenses Due field and fill out all other appropriate fields.

   Note: If you're specifying expenses for an appointment, Phone Log, or a Time Logged item, you do not need to specify a value for Billable Hours or Expense Date. ECCO uses the actual date and time logged when it calculates expenses. If you do specify Billable Hours for those items, ECCO uses the billable hours specified rather than actual logged time. Also note that, if the item has a parent item with a Billing Rate or Billing Code, you can ignore those fields and ECCO will calculate expenses using the parent item's values.
4. Choose the Done button when you have finished.

Calculating Time and Expense Billing

Time & Expenses is available on the Tools menu from anywhere in ECCO. Selecting this command will immediately take you to the Time & Expenses notepad and present you with the Calculate Time and Expense Billing dialog box.

To calculate Time and Expense Billing

1. From the Tools menu, choose Time & Expenses.

   The Calculate Time and Expense Billing dialog box appears.

2. Under Calculate Expense Totals For, select one of the following:

   - To calculate expense totals for all items in the Time & Expenses notepad, select All Items Currently Shown In View.
   - To calculate expense totals for selected items only, select Selected Items Only.
   - To calculate expense totals for all items matching a specific date range, billing code, or expense category, select Items Matching, and then specify the criteria.

     If you use a particular hourly rate for most of your billings, you can enter it in the Default Hourly Rate box.

     This rate will be automatically applied to any item that has no specific rate associated with it or with its parent item.

Note: Specific rates can be applied to an item or its parent item by using either the Expense form or by entering it directly into the Time & Expenses notepad.

3. To have the total calculated and written to the view, select the Add “Totals” Line To View check box. This is useful for printing expense reports.

4. Choose the Calculate button.

5. Once the calculation is finished, you can select Done to return to the Time & Expense notepad.

   Or

   Select Back to return to the Calculate Time And Expenses Billing dialog box.

   Or

   Select Print View to display the Print Notepad dialog box. For more information about printing notepads, see the section on Printing in the User’s Guide or in online Help.

Launching the Internet

If you have access to the Internet, you can use a World Wide Web (WWW) browser (such as the WebSurfer in NetManage’s Internet Chameleon) and ECCO to go directly to any FTP or WWW site.

To launch the Internet from ECCO

1. Select an item containing an Internet address, FTP, or World Wide Web site.

   Or

   Double-click any Internet address description.

2. From the Tools menu, choose Launch Internet.

The first time you use the feature, the Setup Internet Connectivity dialog box will appear. Select your browser and provide a path to the program.

After you have setup Internet Connectivity, selecting the Launch Internet option will open your Web browser.

Note: Try shooting Internet addresses and World Wide Web locations directly into your ECCO PhoneBook using the Shooter. ECCO's auto-assign feature automatically puts Internet addresses into a folder called Net Location. For more information on Auto Assignment, see the chapter or online help on "Folders."

Using the ECCO Internet Address Book

The ECCO Internet Address Book provides a directory of more than 2,000 World Wide Web sites. The ECCO Internet Address Book is an ECCO file (INTERNET.ECO) that you can use with your favorite Web browser. Double-click an item or use the Launch Internet feature from the Tools menu to go to an item.

To use the ECCO Internet Address Book

1. Choose the Start button and select Programs from the Start menu.
2. Select NetManage ECCO Pro, then Internet Address Book.
3. Select a Web site and, from the Tools menu, choose Launch Internet.

   Or

4. Double-click a Web site's description.

Chapter 15. File Sharing

If you're working on a networked system, you can take advantage of ECCO's file sharing capabilities. With file sharing, the dissemination of information is simplified; users are granted a certain degree of access to a file, and they can easily read, modify, or add information according to the level of permission they've been granted.

The ECCO Workgroup Directory

The *ECCO Workgroup Directory* is a network directory that stores shared ECCO files. All ECCO users who have access to this directory can access shared files.

Note: Your ECCO user identification is based on your mail system address (user name and password). As a result, anyone who knows your user name and password has complete access to information in your shared files. NetManage recommends that you follow standard security procedures to protect the data in your ECCO files.

Connecting to the ECCO Workgroup Directory

Before you can share files or access shared files, your computer must be connected to the ECCO Workgroup Directory.

To create and connect to a new ECCO Workgroup Directory

1. Create an empty directory on the network. This directory needs to be in a commonly accessible location to all users who will connect to the workgroup and that provides file read and write access privileges to each user.

2. From the File menu, choose Workgroup Settings.

   ECCO displays the Workgroup Settings wizard. This wizard will help you quickly and easily connect to an ECCO Workgroup Directory. Choose the Next button to proceed.

3. In the mail client list box, select the mail client installed on your computer.

4. You can also choose to have ECCO login to mail upon startup by checking the Login to mail when ECCO starts checkbox. If you leave the checkbox blank, ECCO will not login to your mail client until group scheduling functions occur. Choose the Next button to proceed.

5. You are now presented the option to connect to an existing ECCO Workgroup Directory. To create the ECCO Workgroup Directory select Yes, then choose the Next button.

6. To complete the process of creating an ECCO Workgroup Directory, type a description up to 60 characters that others will see when connecting.

7. In the Workgroup Path text box, type the path to the directory on the network or use the Browse button to select the directory. Choose the Next button to continue.

   Note: Consult your network administrator for assistance. In addition, when creating ECCO Workgroup Directories through this wizard, all users must have the identical drive mapping to the network directory.

8. Choose the Finish button to complete your connection to the ECCO Workgroup Directory.

To connect to an existing ECCO Workgroup Directory

1. From the File menu, choose Workgroup Settings.

   ECCO displays the Workgroup Settings wizard. This wizard will help you quickly and easily connect to an ECCO Workgroup Directory. Choose the Next button to proceed.

2. In the mail client list box, select the mail client installed on your computer.

3. You can also choose to have ECCO login to mail upon startup by checking the Login to mail when ECCO starts checkbox. If you leave the checkbox blank, ECCO will not login to your mail client until group scheduling functions occur. Choose the Next button to proceed.

4. You are now presented the option to connect to an existing ECCO Workgroup Directory. To connect to an existing ECCO Workgroup Directory select No, then choose the Next button.

5. Select Yes for Configuring ECCO for Connecting to an ECCO Scheduling Server only if you will be performing group scheduling via TCP/IP servers. Otherwise, leave the default of No, and choose the Next button to proceed.

6. If you chose Yes for ECCO scheduling server, the wizard will request the server name—either the name or IP address is acceptable. Enter the information in the Server Name field.

   If you chose No for ECCO scheduling server, the wizard will request the path to an ECCO Workgroup Directory. Enter the path or choose the Browse button to search and select the directory.

   Note: You may want to consult your network administrator for scheduling server or ECCO Workgroup Directory information.

7. Choose the Next button to proceed, and then choose the Finish button to complete your connection to the ECCO Workgroup Directory.

Note: You need to connect to an ECCO Workgroup Directory only once unless you move to a different group or server. If your duties change or if you transfer to another department within your organization, you may need to change ECCO Workgroup Directories. See your network administrator for details.

You can now share your group files—Calendar, PhoneBook, and Notepads—with other ECCO users who have both access to this ECCO Workgroup Directory and access privileges to the shared file.

Sharing ECCO Files

There are two types of shared ECCO files:

- The **Main Calendar and PhoneBook file**. ECCO uses the information in this file to determine your schedule availability. This file also logs you in to the ECCO user database and sets up a name to allow others to give you access privileges to their own ECCO files.
- **Other shared files**. These are primarily data files that contain task or project information.

Note: If you try to share a file before you have established workgroup connections, you'll see a dialog box that informs you E-mail Service Not Found. Refer to the above section on Connecting to the ECCO Workgroup Directory for assistance.

To share an ECCO file

1. From the File menu, choose Share.

   ECCO displays the Workgroup Settings wizard. This wizard will guide you through the steps required to share your file. Choose the Next button to proceed.

2. The wizard presents you with three options:
   - Select the My calendar for group scheduling option if the file contains your primary Calendar and PhoneBook.
   - Select Another Shared File if the file does not contain your main Calendar and PhoneBook.
   - Select A Meeting Resource if you are making modifications to a existing Meeting Resource. For more information on Meeting Resources, see the section on Creating Meeting Resources in the User's Guide or in online Help.
3. Select the ECCO Workgroup Directory from the Share in Workgroup list box. Choose the Next button to proceed.

To share your Main Calendar File

1. If you choose the My calendar for group scheduling option you will be asked to select how much information from your file will be available to other users. Make a selection and then choose the Next button.

- **Available times only** allows other users to see if you are available. Other users can't see any additional information about your schedule, such as description of appointments. They also do not have access to any of your PhoneBook or Notepad views.
- **Appointments and times** allows other users to view your Calendar and see detailed information about your schedule, such as a description of appointments on your calendar.
- **Custom options for sharing PhoneBook and notepad views** allows you to assign default access privileges or by user for all areas of your ECCO file, including the ability to add, modify, and delete items.

2. Select whether to designate an administrative assistant to help you manage your schedule. The administrative assistant will receive your group scheduling requests and can respond to or initiative scheduling actions on your behalf. Choose the Next button to proceed.

3. If you chose to use an Administrative Assistant, the wizard will display a list box of the available ECCO Workgroup Directories and the users in each one. Select the user to designate as your administrative assistant. Choose the Next button to continue.

4. If you chose Custom options for Sharing PhoneBook and Notepad views the File Sharing wizard will display options for the degree of access that others will have to the file. For more information on access privileges see the following section Granting Access Privileges. Choose the Next button to proceed.

5. The File Sharing wizard will display the file name that will appear to other users. Choose the Finish button.

To share as Another Shared File

1. If you chose the Another Shared File option you will be asked for a description for the file. This is the description other users will see when they choose the Open Shared File command from the File menu. Choose the Next button to proceed.

2. Select how much information from the file will be available to other users. Selecting the Custom option will allow you to assign access privileges by user. Choose the Next button to proceed.

   - **See information only** permits any changes or manipulations to how the ECCO views are displayed.
   - **Change information** allows users to modify information contained in the file.
   - **Customize views and information** allows users to customize views with the ECCO file.
   - **Custom** allows you to assign default access privileges or by user for all areas of the ECCO file.

3. Select the public status of existing notepads in the file you are sharing. You can choose to share all existing notepads, or reserve the right to do so at a later time. Choose the Next button to proceed.

4. If you chose Custom options for Allow Others To, the File Sharing wizard will display options for the degree of access that others have to the file. For more information on access privileges see the following section Granting Access Privileges. Choose the Next button to proceed.

5. The File Sharing wizard will display the file name that will appear to other users. Choose the Finish button.

Shared Files and the ECCO Workgroup Directory

For each file that is shared, two files (*.ECG and *.ECB) are created in the ECCO Workgroup Directory. A third file (*.ECC) is created when you grant access privileges.

- **The Master File (.ECG)** This file lists access privileges of (and user changes to) the shared file and the master log of changes.
- **The ECCO Group OLE Object File (.ECB)** This file contains all OLE objects embedded in the shared file.
- **The Common ECCO File (.ECC)** This file contains saved Calendar, PhoneBook, and Notepad information associated with the file. If the shared file is the Main Calendar and PhoneBook file, its file name is based on your mail user identification (*username*.ECC). If the shared file is of the other type, its file name is based upon the public file description entered in the File Sharing & Access Privileges dialog box. For example, if you typed "Policy Notes" in the File Sharing & Access Privileges dialog box, ECCO would save your file as POLICYNO.ECC.

Granting Access Privileges

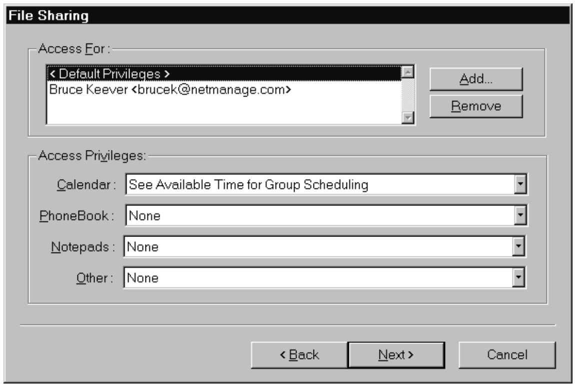
For each file you share, you must specify the degree of access that others can have to it:

- **None** prevents others from having access.
- **See** grants read-only privileges.
- **Add** allows others to add information to the file.
- **Modify** allows others to modify information in the file.

To grant access privileges

1. From the File menu, choose Share. Refer to the prior section on how to share an ECCO file for using the File Sharing wizard.

   The File Sharing privileges dialog box appears.



The access privileges dialog box is displayed during the File Sharing wizard by choosing the Custom option.

2. As desired, modify the names on the file-access list, or change privileges for those already there and choose OK.

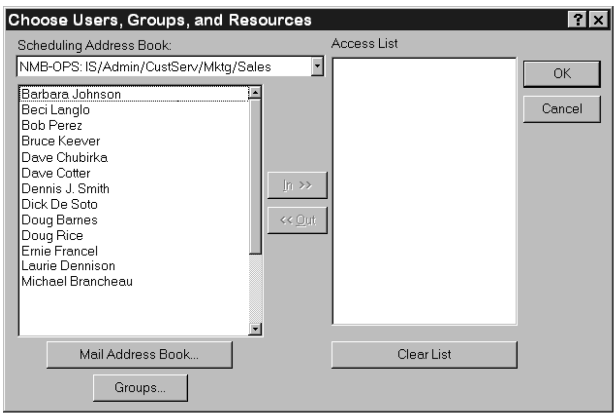
   For detailed information on modifying file-access lists and privileges, see the descriptions below.

Note: Unless you grant specific access privileges for each user, all users with access to the ECCO Workgroup Directory will have default privileges for shared files.

To add names to a file-access list

1. Choose the Add button under Access Privileges.

   The Choose Users, Groups, and Resources dialog box appears.



2. Select the users who will be authorized to access the file. To create a group of users under one name, choose the Groups button and complete the Edit Groups dialog box.

3. Choose OK.

To grant access privileges for each user

1. Select the user name in the Access For list box and choose the down arrow beside the view's privileges you want to modify.
2. Select the appropriate privilege for the selected user. Repeat this step for all views you want to change. (You must repeat this process for all users listed in the Access For box.)

To specify default access privileges for a view

1. Select Default Privileges in the Access For list box.
2. Choose the Down arrow beside the view you want to change.
3. Choose the desired privilege for the view.
4. Choose OK to save your settings.

Note: You can also grant administrative assistant privileges for your main Calendar and PhoneBook file to another user. For more information, see the chapter or online help on "Group Scheduling."

These default privileges will be in effect for any unregistered user who tries to access your file or when you add new users to a file's access privileges list. *Unregistered users* are users who are connected to your workgroup directory but are not specifically named in your access privileges list, or, they are named in your list but have not yet connected to your ECCO Workgroup Directory.

Using Passwords to Protect ECCO Files

By adding passwords, you can protect the information in your private .ECO files.

Note: If you forget the password, you will not be able to open your file. There is no "backdoor" method of accessing the file.

To add or change a password

1. From the File menu, choose Properties.

   The File Properties property sheet appears.
2. Select the Password tab. In the Old Password text box, type your old password and press TAB. If you have not previously set up a password for this file, leave this box blank.

   For maximum security, ECCO does not display the characters as you type; an asterisk (*) appears for each character.
3. In the New Password text box, type your new password and press TAB.
4. Verify your new password by typing it again in the Confirm Password text box.

5. Choose the OK button.

   If your second attempt to type the new password does not match the first, ECCO displays an error message in the bottom portion of the dialog box.

Your new password is saved with your .ECO file. You will be required to use it the next time you open the file. You must give the password to anyone using a shared copy of your file.

Note: Each file can have its own password. Passwords are case sensitive.

To delete an existing password

1. From the File menu, choose Properties.

   The File Properties property sheet appears.

2. Select the Password tab. In the Old Password text box, type your old password, leaving the new password text boxes empty.

   For maximum security, ECCO does not display the characters as you type; an asterisk (*) appears for each character.

3. Choose the OK button.

Working with Shared Files

Depending upon the access privileges you have been granted for a file, you can add, modify, and delete appointments, meetings, notes, and outlines.

With sufficient privileges you can also modify folders, columns, and forms.

To open a shared file

1. From the File menu, choose Open Shared.

   The Open Shared ECCO File dialog box appears.

2. Under File Type, select either Main Calendar, PhoneBook, etc. of individual users or Other Shared Files.

3. Select the ECCO Workgroup Directory from the list box for the workgroup you want to view.

4. Under File Description, select the file that you want to open.

   When you open a shared file, you can also create your own private folders, columns, and views. Select the Let Me Create Private Columns and Folders option to keep a local copy of the shared file.

5. Choose OK to open the shared file.

ECCO verifies that you have appropriate privileges for that file and then displays the Calendar with the authorized information.

When you no longer need access to the file, you can disconnect from it.

Disconnecting from a Shared File

The time will come (for example, if you complete work on a specific project or if you transfer to another department) when you will want to disconnect from a shared file. You must then decide whether to maintain public information in your private file.

To disconnect from a shared file

1. From the File menu, Properties.

   The Open Shared ECCO File dialog box appears.

2. On the Connection Status tab choose the Disconnect button.

3. Choose the Disconnect button.

Deleting a Shared File

To delete a shared file

1. Open the local file.

2. From the File menu, choose Properties.

   The Open Shared ECCO File dialog box appears.

3. On the Connection Status tab choose the Disconnect button.

4. Choose the Disconnect button.

5. Use Windows Explorer or File Manager to delete the local file (*.ECO), the master file (*.ECG), the graphics file (*.ECB), and the common ECCO file (*.ECC). All private and shared information will be deleted. You cannot undo this step.

Working with Shared Views and Items

When a view is shared, so are its items, filters, folders, label styles, and columns.

How to Identify a Shared Item

Shared items are distinguished by a yellow, marked bullet; shared folders are distinguished by a mark in the upper-left corner of a yellow folder icon (shared menu items, filters, outlines, label styles, and so forth, are distinguished by an asterisk [*] next to their name).

Sharing ECCO Notepads

To make a Notepad public, you must explicitly share it.

To share a Notepad

1. Switch to the Notepad you want to share.
2. From the View menu, choose Make Public. A share mark appears inside a yellow item bullet for each item in the view, which indicates that the item is public.

To make an item private

If there are a few items you would like to keep private in a folder you have shared, you can make those items private. Private items are indicated by a blue item bullet.

1. Select any shared item.
2. From the Item menu, choose Make Item Private.

Note: To quickly mark an item private, select the item and click the right mouse button. From the pop-up menu, select Make Item Private.

Shared Items and Context Parents

When you add a subitem to a public folder, only that subitem goes into the folder. However, the items directly above the subitem, the *context parents*, appear in the files of all users to provide the necessary context.

Changing Shared Items

Anyone with access privileges that permit modification can change a shared item.

To change shared items

1. Select the item you want to change.
2. Make the desired changes.

Changes appear immediately throughout the file and in all open copies of the file.

Sharing Folders

When you share a folder, the items in the folder become available to other users. Any item added to a public folder also becomes public. For more information, see the chapter or online help on “Folders.”

You can share a folder by adding it to a public view or by using the Folder menu in the folder window. Folder sharing is not a reversible process—shared folders must remain public unless the file is disconnected.

To share folders

1. From the Folder menu, choose Edit Folders, and then select the folder you want to share.

2. From the Folder menu, choose Make Public.

   A share mark appears inside the folder icon, and its color changes to yellow. All items in the folder (or added to this folder) will be public.

Viewing the Contents of a Shared Folder

You can display a shared folder's contents in the Scratch notepad.

To view the contents of a shared folder

1. From the View menu, choose Folder Window.

   The Folder window appears.

2. Double-click the folder icon you want to see.

   The Scratch notepad appears and displays the contents of the selected folder.

Sharing Columns

When you share a view, its columns become public. Once the view has been made public, any ECCO user can add private columns. For more information about columns, see the section on Columns and Values in the User's Guide or in online Help.

Note: Before you can share a column, you must first make public the view in which it appears.

To share a column

1. Select a cell in the column you want to share.

2. From the Column menu, choose Make Public.

To add a private column to a public view

1. Select a cell in any column or click any column heading in the Column pane. You can select a cell using either the mouse or the arrow keys.

2. From the Column menu, choose Insert Column, and then choose a column type from the menu.

3. In the Column Heading dialog box, supply a name for the column.

4. Choose the OK button.

   The New Column dialog box appears, in which you can specify whether you want the new column to be public or private.

5. Choose the Private button. ECCO inserts a new, private column in the view.

   Note: This will create a local copy of the shared file if one does not already exist.

Sharing Forms

To share a form, do the following:

1. From the Tools menu, choose Manage Forms.

   The Manage Forms dialog box appears.

2. In the list of forms, select the form you want to share.

3. Select the Make Public check box.

4. Choose the OK button.

   This form will appear on the various forms menus when other users open your shared file.

Chapter 16. Group Scheduling

It’s easy to schedule meetings with anyone on your network using the group scheduling feature in ECCO. Using this feature, you can:

- Determine the availability of other ECCO users and schedule meetings accordingly.
- Send meeting mail.
- Add outline notes to a meeting description.
- Change the time, date, or duration of meetings.
- Cancel or reschedule meetings.
- Respond to meeting request.
- Delegate another user to attend a meeting on your behalf.
- Decline an invitation.
- Invite others to a meeting.

Scheduling Meetings

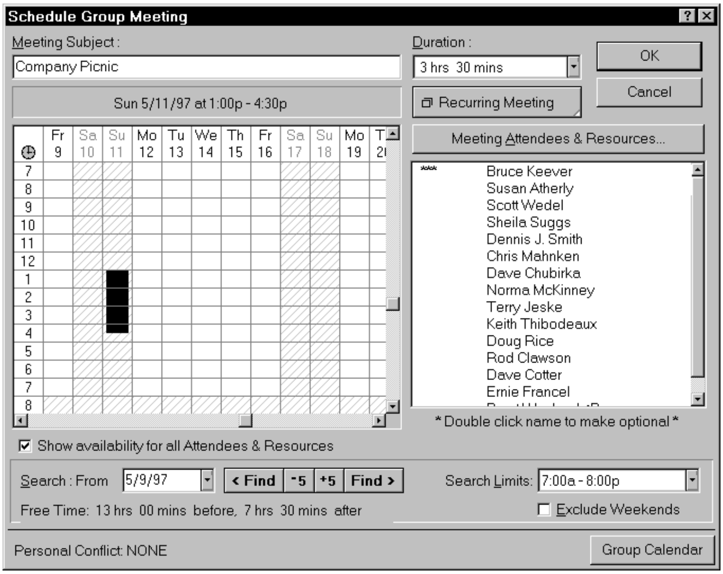
In ECCO, the user scheduling the meeting is called the *initiator*; users selected to attend the meeting are called *attendees*. Before you can schedule a group meeting, you must connect to an ECCO Workgroup Directory and share your ECCO file to make your Calendar available to others. For more information, see the chapter or online help on “File Sharing.”

To schedule a meeting

To schedule a group meeting, you must first open the Calendar. Then follow these steps:

1. From the Calendar menu, choose Add Group Meeting.

   The Schedule Group Meeting dialog box appears.



If you want to make recurrences of this meeting choose the Recurring Meeting button and select the desired frequency.

2. Choose the Attendees & Resources button to select meeting attendees.

   ECCO displays the Choose Users, Groups, and Resources dialog box.

3. Select the attendees for the meeting. If you have access to multiple ECCO Workgroups, you can select the workgroup in the Scheduling Address Book list box.

Note: Attendees are “Required” by default. To designate attendees as “Optional,” double-click the users’ names in the Schedule Group Meeting dialog box.

ECCO displays the schedule availability in the time grid:

Color	**Indicates**
Blue	Proposed meeting
Red	Schedule conflict (attendees with conflicts have an X next to their names)
Green	Initiator’s appointments
Dark Gray	Required Attendees’ appointments
Light Gray	Optional Attendees’ appointments

4. Take one of the following actions:

   - If schedule conflicts exist, select a new date and time by either clicking on them or by using the Search buttons.

- If no schedule conflicts exist, choose OK. The Send Meeting Request dialog box appears.

5. Type additional meeting message information, and then choose Send.

To make an appointment into a group meeting

1. Open the Date Settings dialog box by clicking the appointment time of the appointment you want to change.

2. Choose the Group button in the Date Settings dialog box.

3. Choose the Make Group Meeting command.

   ECCO displays the Change Appointment to Group Meeting dialog box. Follow steps 2 through 5 under “To Schedule a Meeting,” above.

Selecting Meeting Attendees

Use the Choose Users, Groups, and Resources dialog box to select meeting attendees. You can invite other ECCO users who share the same ECCO Workgroup Directory, users of other connected ECCO Workgroup Directories, and anyone listed in your mail post office.

To select meeting attendees

1. Choose the Attendees & Resources button in the Schedule Group Meeting dialog box.

   ECCO displays the Choose Users, Groups, and Resources dialog box.

2. Select any user in the Scheduling Address Book list by clicking on the user’s name. To select multiple users, click while holding down the SHIFT key (for sequential names) or the CTRL key (for non-sequential names).

   To view users in other connected ECCO Workgroup Directories choose the down arrow button to the right of the Workgroup name list box and select the other connected workgroup user listing you want.

   Choose Mail Address Book to invite users who are not in the Scheduling Address Book list. This command uses the addressing services of your electronic mail program. You can send meeting invitations to anyone in your network post office.

3. Choose the right arrow button to add the selected users to the Meeting Attendees list.

4. When you have selected all the attendees for your meeting, choose the OK button.

   ECCO checks the availability database and then displays meeting availability for meeting attendees who are connected to the same or a connected ECCO Workgroup Directory as your main file.

Note: You can quickly add users to the Meeting Attendees list by double-clicking the name.

Creating a Meeting Attendee Group

If you frequently invite the same people to group meetings, you'll find it more efficient to create a *meeting attendee group*–an alias that organizes groups of users under a single name. For example, the "Interns" meeting attendee group contains the names of all 25 college students working at the Daily Bugle newspaper. When the managing editor needs to schedule a meeting, she invites the Interns meeting attendee group and thereby avoids having to individually invite the 25 people who make up the group.

Meeting attendee groups are easy to identify — they're preceded by a small *x* in the Scheduling Address Book list box.

Note: Any users sharing the ECCO Workgroup Directory can create, modify, and delete meeting attendee groups.

To create a meeting attendee group

A meeting attendee group can include 1) other ECCO users who share the same ECCO Workgroup Directory 2) other ECCO users who are in connected ECCO Workgroup Directories and 3) external users (anyone who is in your e-mail post office address list).

1. From the Calendar menu, choose Add Group Meeting.

   The Schedule Group Meeting dialog box appears.

2. Choose the Attendees & Resources button.

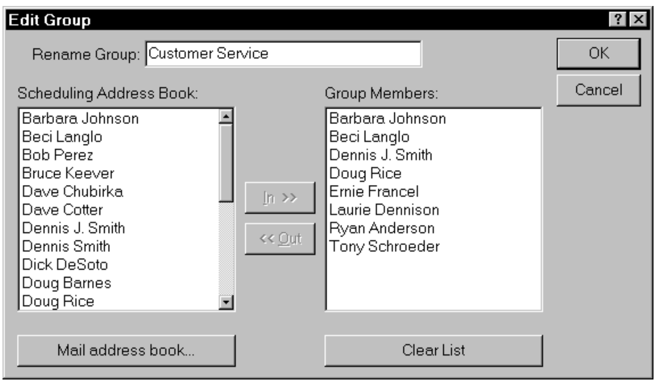
   The Choose Users, Groups, and Resources dialog box appears.

3. Choose the Groups button in the Choose Users, Groups, and Resources dialog box.

   The Edit Groups dialog box appears.

4. Choose the New button.

   The Edit Groups dialog box appears.



5. In the Rename Group text box, type a name that will allow you, and other users sharing your ECCO Workgroup Directory, to identify the meeting attendees for that group.

6. Select users for your new group by clicking on names in the Scheduling Address Book. You must select at least one user for a group.

7. Choose the right arrow button (labeled “In”) to add the selected users to the Group Members list.

Note: You can quickly add users to the Group Members list by double-clicking the name.

8. When you have finished selecting members for the group, choose the OK button.

   ECCO displays your new meeting attendees group in the Edit Groups dialog box.

9. Choose the OK button.

   Your new meeting attendee group is created and appears in the Scheduling Address Book list box. Each time this group is selected to attend a meeting, ECCO automatically checks schedule availability for each individual in the group.

Modifying a Meeting Attendee Group

From time to time, you might want to change the name of a meeting attendee group or add or remove individuals from your group.

To change a meeting attendee group

1. From the Calendar menu, choose Add Group Meeting.

   The Schedule Group Meeting dialog box appear.

2. Choose the Attendees & Resources button.

   The Choose Users, Groups, and Resources dialog box appears.

3. Choose the Group button in the Choose Users, Groups, and Resources dialog box. The Edit Groups dialog box appears.

4. Select the group you want to edit, and then choose the Edit button.

   The Edit Group dialog box appears.

5. Take one or more of the following actions to modify your group attendee list:

   - To change the name of the group, type a new name in the Rename text box.
   - To add another user, click on the user’s name in the Scheduling Address Book list, then choose the In button to add the selected user to the Group Members list.

- To remove a user, double-click on the user's name in the Group Members list box, or select the name and then press the Out button. You cannot remove all users from a group.

6. When you are through changing your group, choose the OK button.

   ECCO displays the modified group in the Edit Groups dialog box.

7. Choose the OK button.

Sending Meeting Mail

ECCO uses electronic mail to send meeting notices between meeting initiators and attendees. *Meeting mail* is automatically generated when you schedule a meeting, cancel a meeting, or respond to a meeting request. You can display a list of your meeting mail in a Mail window at the bottom of the ECCO program window.

To send meeting mail

1. Go to the meeting date and time in the Calendar.

2. In the Appointment section, click on the meeting time.

   The Review Meeting dialog box appears.

3. Choose Send Mail.

   ECCO opens a Send Meeting Notes dialog box. ECCO completes the message header section for you by using information stored in the meeting database. ECCO also includes any notes in your Calendar, such as meeting agenda, meeting minutes, and so forth.

4. Type your message text, or edit the existing text.

5. Choose Send to send your message to the addressees listed on the To line.

Note: For some meetings, a description of just a few words might be adequate. For others, you might want to include additional background information, such as a meeting agenda, in the form of outline notes.

Rescheduling a Meeting

You can change the scheduled time or date of a meeting by:

- using the Review Meetings dialog box
- dragging the Busybar block to another time or date
- dragging the meeting to another time or date

To reschedule with the Review Meetings dialog box

1. Select the meeting that you want to reschedule.

If necessary, use the Navigator to switch to the meeting date and time in the Calendar.

2. In the Appointment section, click on the meeting time.

   The Review Meeting dialog box appears.

3. In the Review Meeting dialog box, choose Reschedule.

   The Reschedule Group Meeting dialog box appears.

4. Select a new date and time for the meeting by clicking on a new date and time in the time grid or by using the Search arrows. ECCO automatically checks the Availability Database and displays the scheduled meetings for attendees in the time grid.

5. Take one of the following actions:

   - If there are schedule conflicts, use the Search From and Mini-Navigator buttons to select another date and time for the meeting.
   - If there are no schedule conflicts, choose OK. ECCO will open the Send Meeting Request dialog box.

6. Choose Send to send the new meeting request message.

Note: When a meeting is rescheduled, the status of each attendee is set to *undecided*. Each user can then accept or decline the new meeting date.

To reschedule with the Busybar or item bullet

You can drag a meeting's Busybar block or item bullet to any time or date that appears in the appointment section of the Calendar.

1. Point to the middle portion of the Busybar block for the meeting and hold down the mouse button.

   Or

   Point to the item bullet (to the left of the meeting text) and hold down the mouse button.

   The pointer changes to a four-headed arrow. If you're dragging the Busybar block, a box displays the meeting time as you drag.

2. Drag the meeting to a new time or date.

   ECCO indicates any conflicts with a red-and-white striped pattern in the Busybar block.

   The Change Meeting Appointments dialog box appears.

3. Choose OK to confirm the change.

   The Send Meeting Request dialog box appears.

4. If desired, type in an explanation for the changes.

5. Choose Send to notify the attendees of the change in meeting time.

Changing Meeting Duration

To change the duration of a meeting, use the Busybar or the Reschedule Group Meeting dialog box.

To change meeting duration

1. Select the Busybar block for the meeting whose duration you want to change.

   ECCO displays an arrow at both ends of the bar.

2. Drag either arrow to the appropriate beginning or ending time.

   ECCO displays the new meeting time in 15-minute increments as you drag.

3. Release the mouse button when the appropriate time is displayed.

Note: You can also select the meeting text and press F2. In the meeting edit box you can enter or change dates and times from the keyboard. Click the down arrow or press the INSERT key to display the Review Meeting dialog box.

Reviewing and Changing Attendee Status

Once your group meeting is scheduled, you can quickly review and change attendee status. This option is particularly useful when you schedule meetings with non-ECCO users. For example, since ECCO is compatible with most popular electronic mail programs, you can send meeting invitations to non-ECCO users who are connected to your e-mail network.

To change attendee status

1. In the Calendar, select the meeting, and then click on the meeting time to the left of the meeting description.

   The Review Meeting (Initiator) dialog box appears.

2. In the Attendees list, select the name of the user for whom you want to change attendee status.

3. Choose the Status button.

   The Attendee Status dialog box appears.

4. Select the new status option for the attendee.

5. Choose OK.

ECCO automatically updates the meeting database with this information.

To uninvite an attendee

1. In the Calendar, select the meeting, and then click on the meeting time to the left of the meeting description.

   The Review Meeting (Initiator) dialog box appears.

2. In the Attendees list, select the name of the user for whom you want to un-invite.

3. Choose the Status button.

   The Attendee Status dialog box appears.

4. Choose the Un-Invite User button.

5. Choose OK.

ECCO automatically updates the meeting database with this information.

Canceling Meetings

Only initiators (and administrative assistants of initiators) can cancel meetings.

To cancel a meeting

1. In the Calendar, click on a meeting for which you are the initiator. The Review Meeting Dialog appears.

2. Choose the Delete Mtg. button.

   A dialog box appears, asking you to confirm your actions.

3. Choose OK

   The Send Cancellation dialog box appears.

4. If desired, type in a reason for the cancellation. Then choose Send.

   Or

5. In the Calendar, select a meeting.

6. From the Edit menu, choose Delete Items.

   A dialog box appears, asking you to confirm your actions.

7. Choose OK.

   The Send Cancellation dialog box appears.

8. If desired, type in a reason for the cancellation. Then choose Send.

Checking Group Calendars

If you want to check the schedules of others, it's easy to do so using the Show Group Calendar command.

To check group calendars

1. From the Calendar menu, choose Show Group Calendar.

   The Choose Users, Groups And Resources dialog box appears.

2. Add one or more names as meeting attendees, and choose OK.

   You can select ECCO users from other connected ECCO Workgroup Directories by pressing the down arrow button to the right of the workgroup name field and selecting the desired ECCO Workgroup Directory.

   The week's summary view appears, showing the calendars of all attendees (the information can also be shown in month summary).

Responding to Meeting Requests

Reading Meeting Mail

To view the Meeting Mail window, from the View menu, choose Meeting Mail. To hide the Meeting Mail window, choose the Close button, which is located in the upper-left corner of the Meeting Mail window.

To read meeting mail

Once the Meeting Mail window is visible, use one of the following procedures to read meeting mail:

- Select the message in the message pane of the Meeting Mail window, and choose Read Mail.

  The Meeting Message dialog box appears.

- Double-click the message in the message pane of the Meeting Mail window.

  The Meeting Message dialog box appears.

- Select the message in the message pane of the Meeting Mail window, and choose Find Meeting.

  The meeting date and time appears in your Calendar.

  Then choose Read Mail. The Meeting Message dialog box appears.

Reviewing Your Schedule before Responding to a Meeting Request

ECCO makes it easy to double-check your existing commitments for the day of a requested meeting.

To review your schedule

1. In the meeting message window, select the Meeting Request message.
2. Choose Find Meeting to locate the date and time the meeting is scheduled to occur.

   ECCO displays the meeting date in your Calendar and selects the time for the subject meeting.

Accepting, Declining, or Delegating a Meeting Request

Attendees receive a Meeting Request message whenever a meeting is scheduled. They can accept, decline, or delegate the meeting to someone else.

- When an attendee accepts a Meeting Request message, ECCO adds the meeting to the Calendar in the user's main ECCO file that contains the Calendar and PhoneBook.
- If the Show On Calendar If Declined Or Delegated option is selected, the meeting is added *in gray text* to the Calendar if the user declines the meeting request.

To accept or decline a meeting request

1. In the meeting message window, select the Meeting Request message.
2. Choose Read Mail to open and read the meeting request message.

   Or

   Double-click on the Meeting Request message to open the message. The Meeting Request message appears.
3. In the Meeting Request dialog box, choose Accept or Decline.

   ECCO prepares the appropriate meeting response message.
4. To include additional information with your response, type the information in the text area of the message form. Then choose Send to transmit the message.

To appoint a delegate

1. In the Meeting Request dialog box, choose Delegate.

   The Choose Users, Groups, and Resources dialog box appears.

2. Select the name of the delegate.

   You can select ECCO users from other connected ECCO Workgroup Directories by pressing the down arrow button to the right of the workgroup name field and selecting the desired ECCO Workgroup Directory.

3. Choose OK. ECCO displays a Send Delegation request message addressed to the delegate, with a courtesy copy addressed to the initiator.

4. Choose Send in the Meeting Request dialog box.

When the delegate accepts or declines the meeting invitation, ECCO sends a courtesy copy of the meeting response to the delegator.

Note: If you choose to send a delegate, ECCO keeps you informed by sending courtesy copies of all messages that pertain to the meeting.

Inviting Additional Attendees

Attendees can invite others from the Meeting Request dialog box or from the Calendar.

To invite from the Meeting Request dialog box

1. In the Meeting Request dialog box, choose Invite.

   The Choose Users, Groups, and Resources dialog box appears.

2. Select the names of the desired attendees.

   You can select ECCO users from other connected ECCO Workgroup Directories by pressing the down arrow button to the right of the workgroup name field and selecting the desired ECCO Workgroup Directory.

3. Choose OK.

   ECCO displays a Send Invitation request message, with a courtesy copy addressed to the initiator.

4. Choose Send in the Send Invitation dialog box.

To invite from the Calendar

1. Use the Navigator to switch to the meeting date and time in the Calendar.

2. In the Appointment section, click on the meeting time.

   The Review Meeting dialog box appears.

3. Choose Invite.

   The Choose Users, Groups, and Resources dialog box appears.

4. Select additional invitees that you want to attend the meeting.

You can select ECCO users from other connected ECCO Workgroup Directories by pressing the down arrow button to the right of the workgroup name field and selecting the desired ECCO Workgroup Directory.

5. Choose OK in the Choose Users, Groups, And Resources dialog box.

   ECCO displays a Send Invitation meeting request dialog box addressed to your guests, with a courtesy copy addressed to the initiator.

6. Choose Send in the Meeting Request dialog box.

Declining after Accepting

Even after you've accepted a meeting invitation, you or your administrative assistant can subsequently decline it.

To decline after accepting

1. In the Calendar, click on the time of a meeting.

   The Review Meeting Dialog appears.

2. Choose Decline.

   The Send Decline dialog box appears.

3. If desired, provide a reason for declining.

4. Choose Send.

   Or

5. In the Calendar, select a meeting.

6. From the Edit Menu, choose Delete Items.

   A dialog box appears, asking you to confirm your actions.

7. Confirm your actions.

   The Send Decline dialog box appears.

8. If desired, provide a reason for declining.

9. Choose Send.

Deleting Meeting Mail

With one exception, ECCO keeps copies of meeting mail until you delete them. (Meeting *requests* are deleted as soon as you respond to them.)

To delete meeting mail

1. In the meeting message window, select the Meeting Request message that you want to delete.

2. Choose Discard Mail to remove the meeting message from your ECCO Meeting Mail window.

   ECCO deletes the message — both in your ECCO Meeting Mail window and your mail inbox.

Note: Although deleted messages are removed from your inbox, you might need to explicitly delete copies from the "sent mail" box of your mail program.

The Administrative Assistant

With ECCO, you can grant administrative assistant privileges to another user, who can then make changes to your schedule as well as respond to meeting requests on your behalf. Administrative assistants always receive copies of meeting mail messages.

Note: Administrative assistant privileges are valid for the Calendar only. You must explicitly grant user privileges for PhoneBook, Notepad, or other folders or columns.

To add an Administrative Assistant

Administrative Assistants are designated in the File Sharing wizard. You can designate your Administrative Assistant when you first share your file, or subsequently by executing the File Sharing wizard.

1. From the File menu, choose Share.

   ECCO displays the File Sharing wizard. This wizard will guide you through the steps required to share your file. Choose the Next button to proceed.

2. Select the My calendar option.

3. Select the workgroup from the Share in workgroup list box. Choose the Next button to proceed.

4. Select how much information from your file will be available to other users.

5. Select Yes to designate an Administrative Assistant. Choose the Next button to proceed.

6. Selecting Yes will cause the wizard to display a list box of the available ECCO Workgroup Directories and the users in each one. Select the user to designate as your Administrative Assistant Choose the Next button to proceed.

   The File Sharing wizard will display the file name that will appear to other users. Choose the Finish button.

To remove an Administrative Assistant

If you want to change your Administrative Assistant, or exclusively make your own scheduling decisions, you will use the File Sharing wizard.

1. From the File menu, choose Share.

   ECCO displays the File Sharing wizard. This wizard will guide you through the steps required to share your file. Choose the Next button to proceed.

2. Select the My calendar option.

3. Select the ECCO Workgroup Directory from the Share in workgroup list box. Choose the Next button to proceed.

4. Select Custom options for sharing PhoneBook and Notepad views. Choose the Next button to proceed.

5. Select No to designate an Administrative Assistant. Choose the Next button to proceed.

6. Highlight the current Administrative Assistant's name in the Access For section and choose the Remove button. Choose the Next button to proceed.

   The File Sharing wizard will display the file name that will appear to other users. Choose the Finish button.

Note: If you want to add a new Administrative Assistant, you can specify Yes in step 5 above, but you must *still* remove the former assistant as outlined in step 6 as they will retain access to your Calendar, but no longer receive your meeting requests.

To respond to meeting requests for another user

1. Select the message in the message pane of the Meeting Mail window, and choose Read Mail.

   The Meeting Request dialog box appears. To help you quickly identify meeting requests for another user, the Meeting Request dialog box contains a group icon in the upper-right corner.

2. In the Meeting Request dialog box, choose Find.

   The Open Calendar dialog box appears.

Note: To add the meeting to the user's calendar, ECCO must be able to *open* the user's calendar. For example the administrative assistant needs the password for the file.

3. Choose OK to open the user's Calendar. If you have several large files open, you might need to close these files before proceeding. ECCO opens and displays the user's Calendar and selects the date and time of the proposed meeting.

4. In the message pane of the Meeting Mail Window, choose Read Mail to display the Meeting Request dialog box again.

5. Take one or more of the following actions to respond to the meeting request:
   - Choose Accept or Decline
   - Choose Delegate to appoint another individual to attend the meeting.
   - Choose Invite to invite others to the meeting
   - Choose Defer to postpone a decision

Sharing Meeting Resources

With ECCO, you can not only schedule the time of people, but you can schedule the time of resources, such as rooms and equipment. In ECCO, such resources are known as s*hared meeting resources*. By including shared meeting resources as meeting attendees, you reserve them for the selected date and time.

Creating a New Meeting Resource

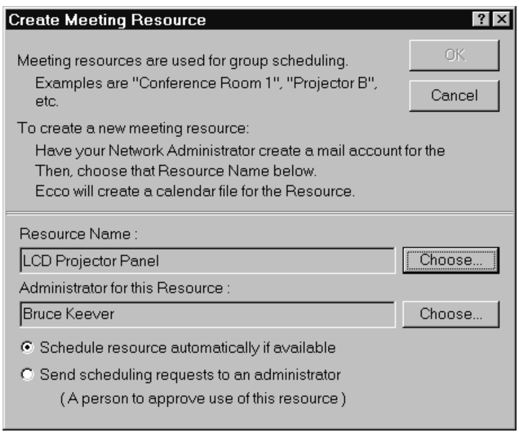
Before you can consider a white board, a meeting room, or an overhead projector a meeting attendee, you must create it as a meeting resource.

To create a new meeting resource

1. Have your mail system administrator establish a new mail account for the resource.

2. From the File menu, select Create Meeting Resource.

   The Create Meeting Resource dialog box appears.



3. Click the Choose button beside the Resource Name text box.

   The Choose Users, Groups, and Resources dialog box appaears.

4. Choose the Mail Address Book button.

   The Select Users dialog box appears.

5. Select the resource in the list, and then choose OK. (For more information on selecting users, refer to the documentation that accompanied your mail program.)

6. From the Choose Users, Groups, and Resources dialog box, choose OK.

7. You automatically become the resource administrator for any meeting resource that you create, unless you click the Choose button beside the Administrator for this Resource text box and select a different user.

8. Select Schedule Resource Automatically if Available (the default).

   Or

   Select Send Scheduling Requests To An Administrator if you want to control scheduling of the new resource. Other users will be able to *invite* the resource, but the resource won't be reserved until the administrator accepts or declines the meeting request.

9. When you are satisfied with the configuration for the resource, choose OK in the Create Meeting Resource dialog box.

   ECCO creates a shared file for the resource.

Note: Before other users can directly open the shared file for the resource, you must also grant the appropriate access privileges for the file.

Appointing a Meeting Resource Administrator

When you create a meeting resource, you must appoint a resource administrator (by default, you automatically become the resource administrator for any meeting resource that you create).

The resource administrator is responsible for managing the main ECCO file for the resource. This includes:

- reviewing and responding to meeting request messages (if Schedule Resource Automatically is not selected)
- changing user access privileges to the Calendar files of the resource
- changing file passwords

In addition, the resource administrator receives a copy of all meeting messages addressed to the resource.

To change a resource administrator

Use the File Sharing wizard to appoint a new meeting resource administrator.

1. From the File menu, choose Open Shared.

   The Open Shared ECCO File dialog box appears.

2. Under File Description, select the meeting resource that you want to change and choose OK.

   ECCO opens the main calendar for the resource and displays the Calendar.

3. From the File menu, choose Share.

   The File Sharing wizard appears.

4. Select a meeting resource and choose the Next button to proceed.

   The wizard displays the current resource administrator. Choose Next to proceed.

5. Select the user name of the person to become the resource administrator. Choose the Next button to proceed.

6. Select whether the resource is autobooked. Choose the Next button to proceed.

7. Select Custom options for sharing PhoneBook and Notepad views. Choose the Next button to proceed.

8. Select the former resource administrator's name from the Access for section and choose the Remove button. Choose the Next button to proceed.

   The File Sharing wizard will display the file name that will appear to other users. Choose the Finish button.

Chapter 17. Synchronizing with ECCO

If you use multiple computers (for example, one at the office and one at home), ECCO can keep track of changes you make on both computers. This process keeps the contents of the files in sync. ECCO does this through *synchronization.*

Synchronization requires two elements — the original file and a special working copy of the file (called the *replica*) that resides on the second computer. Instead of replacing entire files, ECCO exports and imports only the *changes* made to a file.

For example, in your original file on your office computer, you wrote the sentence “The quick brown fox jumped over the lazy dog.” Later, you worked on the file on your home computer and changed the word “jumped” to “tripped”. With synchronization, only the changed word “tripped” would need to be exported from your home computer file to the office computer file. Likewise, if you made a change in your office file, only the changed information would need to be imported from the office file to the replica file on your home computer.

Synchronization: The Terminology

The synchronization process has a language all its own. The following terms are the most important to understand:

The *original file* is the file that exists before the start of synchronization. Original files have the extension .ECO.

The *replica* is a special copy of the original file that you work on at the second computer. Replicas also have the extension .ECO.

The *master file* contains a master log of all changes that occur. It is actually two files that are created when you create a replica: the *.ECG file that contains the changes, and the *.ECB file which contains any OLE links in the file. The master file is updated when synchronization takes place.

Note: Any user — regardless of access privilege — can export or import changes to or from any remote replica.

Methods of Synchronization

ECCO provides three methods of synchronization:

- Disk synchronization (the most common method)
- Electronic mail synchronization
- Automatic synchronization

Each method is, in essence, an exporting and importing process. But only the *changes* made to a file are exported and imported from computer to computer. How the changes get from one computer to another depends on the synchronization method you're using.

Creating the Synchronized Copy

The first step in utilizing the ECCO synchronization process is to create the special synchronized copy. This special copy will be used on your other machine. The advantage to this process is that only a small changes file will be copied between your two machines, versus copying the entire ECCO data file each time.

1. Open the file from which you want to make a synchronized copy. If the file is already open, save it. From the File menu, choose Workgroup Settings.

   ECCO displays the Create Synchronized Copy wizard.

2. Select the appropriate computer option (home computer, laptop computer, another computer) to indicate the computer where the synchronized copy will reside. Enter a description for the copy in the description text field. Choose the Next button to proceed.

3. Enter the file name for the synchronized copy or choose the Browse button to select a path and new file name. Choose the Next button to continue.

4. The wizard will display the path and file name you are about to create. Choose the Finish button.

5. Using Windows Explorer or File Manager, move the replica file to the other computer's hard drive, either via diskette or your network.

   This is the file that you will open and use on your other computer.

6. Make sure to delete the file from the original location where ECCO saved the replica to avoid confusion (moving versus copying the file in step 5 will automatically delete the original source file).

Note: If the computers are networked, depending upon the network connection, you can save the replica file directly to a common network location and then move via the network to the second computer. If the other computer is not networked, you should save the replica file directly to your hard drive. Copy the replica file to a diskette and use the diskette to transfer the file to another computer.

Disk Synchronization

With disk synchronization, you export and import information between computers by means of a removable disk, such as a floppy or Iomega® zip™ disk. For example, you would perform manual synchronization between two non-networked computers that have no other way of communicating. Disk synchronization is the most commonly used synchronization method.

Note: It is important to complete the full synchronization process. If you synchronize only one way, the master file will get very large. ECCO will alert you that you should export your changes.

To export changes

1. Open your original file or any shared file when the network is available.
2. Insert a disk into the disk drive.
3. From the File menu, choose Synchronize, and then choose Export Changes.

   ECCO displays the Export Changes wizard.
4. Select the remote file from the displayed list that will receive changes. Choose the Next button to proceed.
5. Select Floppy disk. Choose the Next button to proceed.
6. Enter the name of the changes file or choose the Browse button to select a new path and file name. Choose the Next button to proceed.
7. The wizard will display the path and file name you are about to create or the e-mail recipient if you chose the Electronic mail option. Choose the Finish button.

Note: If you have synchronized a replica with the Export Changes command, be sure to export changes from the replica back to the master file, *even if you have not made any changes to the replica.*

To import changes

Once you've exported changes, you need to import them to the remote file.

1. Open the remote ECCO file.
2. Insert the disk into the remote computer.
3. From the File menu, choose Synchronize, and then Choose Import Changes.

   ECCO displays the Import Changes wizard.
4. Select the source option for your changes.
5. Enter the update file's path and file name or choose the Browse button to locate and select the file. Choose the Next button to proceed.

6. Press the Finish button to import the changes.

   ECCO imports all changes and merges them into the remote ECCO file.

   ECCO creates a file that reflects changes made in the remote file and reports (to the master file) which changes have been received.

To complete disk synchronization

To complete disk synchronization, repeat the exporting and importing steps, working from the replica to the original file.

Note: You can use the same .EMF file when exporting to and from both the original and replica files. Don't worry if you forget to export changes back to either of these files; ECCO will keep exporting all changes until it receives confirmation that they have been accepted by the other PC. Confirmation will occur the next time you synchronize changes from the other PC.

Automatic Synchronization

If the original file is a shared network file, its replicas have direct access to the master file, and they are automatically synchronized. In this case, no .EMF file is created. This process is also called *working on-line*.

This method of synchronization might be used by someone who has two offices or two machines on one network. With automatic synchronization replicas are automatically updated.

Remote Access Synchronization

If you use third-party software, such as LapLink or PC Remote, to access the computer, you need to perform remote access synchronization. No .EMF file is created for this procedure. With remote access synchronization files are updated through third-party software.

To perform remote access synchronization

To help ECCO find your master file, from the File menu choose Synchronize, and then choose Remote Access Sync.

ECCO displays the name and path of the file it expects to find. Once it has found the appropriate file, ECCO will remember its new name and location. If the remote access program is run after the replica has been opened, you'll need to use the Remote Access Sync command again to initiate synchronization.

Synchronization Using Electronic Mail

You can also use an e-mail program (such as NetManage Z-Mail Pro or Lotus cc:Mail) to export and import changes to original files and replicas. This method of synchronization might be used by a traveling salesperson who dials in for mail.

Choose the method that best suits your needs:

- Mail To: lets you mail changes to someone who has a remote replica of the master file (the changes are sent as an attachment).
- Send Automatically Using Mail Message: lets you export changes at regular, scheduled times.

To synchronize using mail

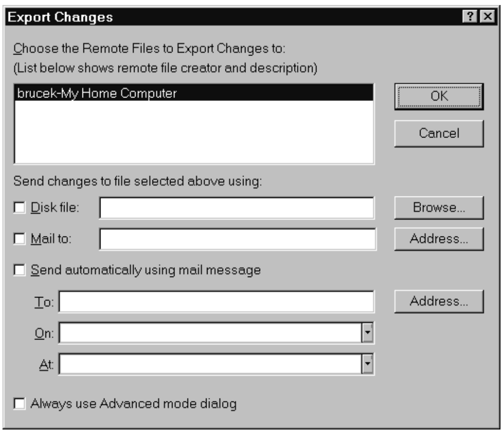
1. Open your original file or any shared file when the network is available.
2. From the File menu, choose Synchronize, and then choose Export Changes.

   ECCO displays the Export Changes wizard.
3. Select the remote file from the displayed list that will receive changes. Choose the Next button to proceed.
4. Select Electronic mail. Choose the Next button to proceed.
5. Enter the name e-mail recipient. Choose the Address button to access the e-mail address book. Choose the Next button to proceed.
6. The wizard will display the name of the e-mail recipient. Choose the Finish button.

Advanced Synchronization

1. Open your original file or any shared file when the network is available.
2. From the File menu, choose Synchronize, and then choose Export Changes.

   ECCO displays the Export Changes wizard.
3. Select the remote file that will receive changes.
4. Choose the Advanced button.



5. Select the remote file that will receive changes.

6. Select Disk File, and either specify a filename (with path), or choose Browse to select from a list of names. (CHANGES.EMF is a good choice for the filename.)

7. Select the method to send the changes. If selecting one of the two electronic mail options, choose the method that best suits your needs:

   - Mail To (type the address in the To field, or choose Address to select the recipient from an existing list of names).

   - Send Automatically Using Mail Message (type the address in the To field, or choose Address to select the recipient from an existing list of names; type values in the On and At fields to specify when messages should be sent, or make selections from the drop-down lists).

8. Choose the OK button.

9. Repeat steps 5 through 7 as desired.

   - With Mail To, messages with files containing the changes are created and sent immediately.

   - With Send Automatically Using Mail Message, messages are sent at the specified times, provided that the ECCO file associated with the merge is open. If it is closed, ECCO sends expected messages as soon as the file is opened.

10. Repeat steps 2 through 6 on the replica to synchronize back.

Note: ECCO checks your mail inbox for messages at the times indicated in the ECCO Options property sheet, mail system tab. When it finds a message containing changes for the replica, it imports the changes and merges them with the data in the replica.

Creating a Replica

ECCO is designed to synchronize up to 250 replicas of each file. A replica is more than a simple copy of a file: it contains special features that make synchronization possible. You *cannot* create a replica by using standard copy commands from File Manager or MS-DOS. Replicas are synchronized with their original file, never with each other.

To create a replica

1. Open the file you want to replicate.

2. From the File menu choose Create Synchronized Copy.

   The Create Synchronized Copy wizard appears. If you're working with a shared file, ECCO will ask if you would like to create a synchronized copy for use on this computer, a laptop computer, or another computer. For this procedure, select Another Computer.

3. Supply a description for the replica, and choose the Next button (it's a good idea to include the date as part of this description).

4. Enter a filename for the replica or choose the browse button to locate and select and filename. Choose the Next button.

   It's a good idea to include *rpl* as part of the name: this will help you identify the file as a replica. Like the original file, the replica will have an .ECO extension.

5. The wizard will display the path and filename of the replica you are about to create. Choose the Finish button to proceed.

6. Repeat steps 1 through 4 for each replica you want to create.

There are two other ways to create a replica:

- If you're working with a shared ECCO file, choose Save As from the File menu and save the current file under a new name. The newly named file is the replica.
- Open a shared file and choose Let Me Create Private Columns Folders And Views.

Once the replica is created, move it to the other computer.

Note: Be sure to delete the replica from the first machine after moving or copying it to the second machine.

To move a replica to another computer

- If you're networked to the other computer, use Windows Explorer or File Manager to move the replica to the other computer's ECCO folder or directory.
- If you're not networked to the other computer, copy the replica to a floppy disk and take the floppy to the other computer. Once you've made the copy, be sure to delete the replica from the first computer.

Chapter 18. Command Reference

Use this Command Reference to find in-depth information on the commands and options unique to ECCO Pro. For information on the standard Windows commands and environment, refer to the *Microsoft Windows User's Guide*.

Menu Bar Commands

The following menus appear on the menu bar of the ECCO program window. The menus are listed in the order in which they appear, from left to right. Non-menu bar menus are listed in the next section of the Command Reference, "Non-Menu Bar Commands." Commands that appear on menus in the Date Settings dialog box are listed in the final section of the Command Reference, "Date Settings Commands."

File Menu

The File menu includes the standard Windows commands for tasks such as opening new or existing files; closing, saving, and printing files; sending mail; and quitting the program. It also includes powerful ECCO commands for tasks such as importing, exporting, and sharing files and information.

File: New

Opens a blank ECCO file based on the template DEFAULT.ECT. To open a new file not based on a template, hold down the CTRL key and choose New.

Note: Every ECCO file contains a Calendar, a PhoneBook, and up to 26 Notepads.

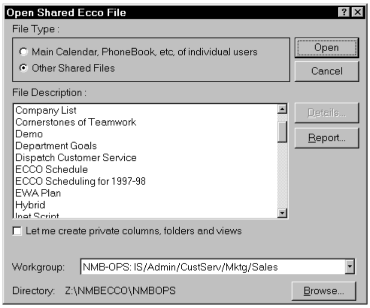
File: Open

Displays a dialog box in which you select the ECCO file or template you want to open. To open a new, untitled file based on an existing ECCO file, select the Untitled checkbox. To open a file as read-only, select the Read-Only checkbox.

File: Open Shared

Displays the Open Shared ECCO File dialog box in which you can open shared files.

Open Shared ECCO File dialog box



File Type Select the type of shared file that you want to view:

Main Calendar, PhoneBook, etc., of individual users Select this option to display a list of the primary shared files of individual users and resources in the ECCO Workgroup Directory.

Other Shared Files Select this option to display a list of other shared files in the ECCO Workgroup Directory.

File Description Displays the list of shared files in the ECCO Workgroup Directory. If you choose Main Calendar, PhoneBook, etc., under File Type, ECCO displays the owner's name (based on the user's mail identification). If you choose Other Shared Files, ECCO displays a list of other shared files in the ECCO Workgroup Directory. In this case, the shared file description (entered in the File Sharing And Access Privileges dialog box) appears in this list box.

Let me create private columns, folders, and views Includes your private information in the shared file. Any private information that you add to the shared file remains private until you make the information public. When you choose this option, ECCO creates a local copy of all of the information in the shared file on your hard disk.

Workgroup Choose the down arrow key to the right of the field to display the list box for other connected ECCO Workgroups.

Browse Button Choose this button to display the Browse For Shared Files dialog box, in which you can search through the list of drives and directories that are available to you until you find the one you want. If you use the Browse button to open a shared file, you are only granted default access privileges.

Details Button Choose this button to display the Shared File Details dialog box. This dialog provides information on a file's ownership, access privileges by user, paths to the Common and Master ECCO files, a list of connections to the file, and a Manage button for removing connections no longer needed.

Report Button Choose this button to display the Shared File Report dialog box. You can choose to print or save the report to a file. The information in the report is the same contained by using the Details button on the Open Shared ECCO File dialog box.

File: Close

Closes the active file. If you have not saved changes to the file and if you have not selected the Autosave On File Close option in the File Properties dialog box, ECCO prompts you to save your changes before closing the file.

File: Save

Saves all changes in all views of the active file under its current name.

File: Save As

Displays a dialog box in which you specify the name under which you want to save the file. The newly saved file then becomes the active file.

File: Send Mail

If you are running NetManage Z-Mail Pro or have an electronic-mail program supporting VIM (such as Lotus cc:Mail) or MAPI (such as Microsoft Exchange), this command opens the program and places the selected items and their subitems into a mail message. Additional options are available when you choose this command from the PhoneBook.

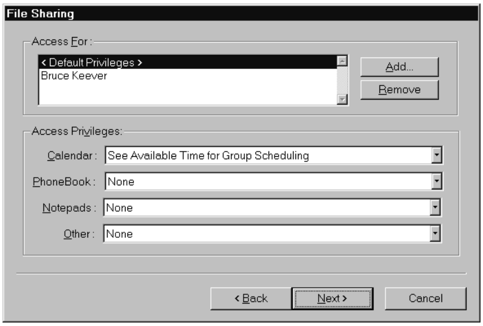
File: Share

Displays the File Sharing wizard, in which you can share your files with others and grant access privileges for other ECCO users.

Using the File Sharing wizard, you can specify default privileges and grant access privileges for users who have access to your ECCO Workgroup. Its flexible design lets you allow some users to only view your information while allowing other users to add, modify, and delete information in your file.

File: Share: Custom

If you select Custom options for sharing PhoneBook and Notepad views during the File Sharing wizard the Access Privileges dialog box will appear during the wizard process.



Access for This list box contains the list of users to whom you have granted individual user access privileges for this file. This list box also contains a <Default Privileges> user identification. Users who are not granted individual access privileges have the <Default Privileges> restrictions. Users who open this file using the Browse button in the Open Shared ECCO File dialog box also have the <Default Privileges> restrictions—even if you have granted them specific access privileges.

Your main file has the following default privileges:

View	Default Privilege
Calendar	See Available Time for Group Scheduling
PhoneBook	None
Notepads	None
Other	None

Other shared files have the following default privileges:

View	Default Privilege
Calendar	See Appts, To-Do’s, Columns, & Notes
PhoneBook	See Name, Form, Columns, & Notes
Notepads	See Items, Columns, & Notes (In Public Notepads)
Other	None

Views and Privileges

Specify the level of access privileges for the Calendar, PhoneBook, and Notepads; and folders, columns, and forms in each ECCO file. The following is a list of the privilege levels:

Calendar

- None

  Cannot open the Calendar.

- See Available Time For Group Scheduling

  This access privilege is available only for main files. By granting this privilege, you allow other ECCO users who are trying to schedule a meeting with you to see when you are available. They will not, however, be able to see any details about specific meetings or appointments.

Note: If you share a main file with only See Available Time for Group Scheduling privileges, ECCO does not create a common .ECO file in the ECCO Workgroup Directory. Therefore, your main Calendar and PhoneBook file will not appear in the list of Main Files for other users. It will appear in your own list because you have a local .ECO file.

- See Appts, To-Do’s, Columns, & Notes

  Can open the Calendar and see all shared ticklers, appointments, subitems, and columns. Authorized users can create their own private columns.

- Add Appointments & To-Do’s

  Can add items to any published date folder in the file, complete with ticklers, times, or alarms.

- Add & Modify Appointments & To-Do’s

  Can add or change appointment times, item text, subitems, or date folder values of any existing item in any published date folder in the Calendar.

- Add, Modify, & Delete Appointments & To-Do’s

  Can add or change appointment times, item text, subitems, or date folder values of any existing item in any published date folder in the Calendar. Can also remove any appointment, item text, subitem, tickler, or alarm from any published date folder in the Calendar.

- Administrative Assistant

  All privileges above, plus privileges to initiate meetings, and accept or decline meeting invitations, on your behalf.

Note: Administrative Assistant privileges are valid in the Calendar only! If you want your administrative assistant to view or modify anything in any other view, folder, or column, you must grant the appropriate level of privileges for those views.

- Owner Of File

  Choose this option to change the ownership of the entire file to the selected user.

PhoneBook

- None

  Cannot open the PhoneBook.

- See Name, Form, & Columns

  Can open the PhoneBook and perform searches. Can also see items in the PhoneBook form.

- See Name, Form, Columns, & Notes

  Can open the PhoneBook, perform searches, and see subitems in the PhoneBook. Can also see items in the PhoneBook form.

- Add PhoneBook Entries

  Can add new items to the PhoneBook using the PhoneBook form or any columns in the PhoneBook.

- Add & Modify PhoneBook Entries

  Can add new items to the PhoneBook using the PhoneBook form or any columns in the PhoneBook. Can also change any item, notes or subitems in the PhoneBook, which includes adding, removing, or modifying folder values in any standard PhoneBook folder or in any folder shown as a column in the PhoneBook. Users cannot, however, remove items from the PhoneBook folder.

- Add, Modify, & Delete PhoneBook Entries

  Can add new items to the PhoneBook using the PhoneBook form or any columns in the PhoneBook. Can also change any item, notes or subitems in the PhoneBook, which includes adding, removing, or modifying folder values in any standard PhoneBook folder or in any folder shown as a column in the PhoneBook. In addition, users can remove items from the PhoneBook folder.

- Owner Of File

  Choose this option to change the ownership of the entire file to the selected user.

Notepads

- None

  Cannot open any Notepad.

- See Items, Columns, & Notes

  Can open any published Notepad; add private columns; expand or collapse items; expand, collapse or resize columns.

- Add, Modify, & Delete Items And Column Values

  Can rearrange, add, and remove items, and make any changes to folder assignments (except items that affect the PhoneBook and Calendar, unless the user has those specific permissions for the PhoneBook and Calendar).

- Owner Of File

  Choose this option to change the ownership of the entire file to the selected user.

Other (folders, columns, and forms)

- None

  Cannot open folder window.

- Add Items By Form

  Can use any shared form to add items to the file. Restrictions on specific views still apply. This option also enables the Add By Form menu command on the Tools menu.

- See Folder Window (Add And Remove Items)

  Can open folder window but cannot go into edit mode. Can assign, change, and de-assign folder values. View-specific restrictions still apply.

- Add, Modify, & Delete Public Folders, Columns, And Forms

  Activates the Manage Notepads command on the View menu and permits editing in the folder window. When you grant this privilege to another user, you also make your Calendar and PhoneBook information accessible. When you grant this privilege level, your Calendar, PhoneBook, and Notepads will be automatically updated to reflect the appropriate access privileges.

- Owner Of File

  Choose this option to change the ownership of the entire file to the selected user.

Add Opens the Choose Users, Groups, And Resources dialog box. Use this command to append users to the Access Privileges list box.

Remove Use this command to remove users from the access privileges list. When you remove a user from the list, all individual privileges are canceled. The user will, however, retain the level of privileges you have granted to the <Default Privileges> user identification.

File: Create Synchronized Copy

Displays the Create Synchronized Copy wizard, in which you specify the computer(s) you will be using while working off-line. The wizard will take you step-by-step through setting up a synchronized copy of your file for use at home, on a laptop, or another computer.

File: Synchronize

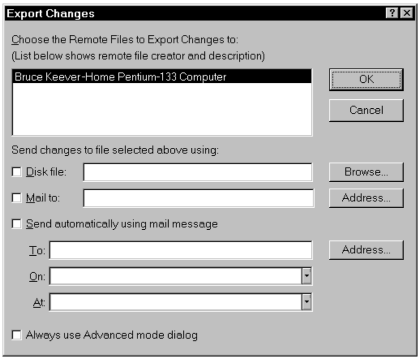
Displays a menu from which you can set up a duplicate ECCO file (replica) for use on another computer, import changes from and export changes to your duplicate file, modify your setup, and synchronize remote files automatically.

File: Synchronize: Export Changes

Displays the Export Changes wizard, in which you select the remote file to synchronize with the ECCO file currently open. The wizard takes you step-by-step through the export process, including selecting making the transfer by disk or electronic mail, or specifying automatic export by choosing the Advanced button.

File: Synchronize: Export Changes: Advanced

The Advanced button on the Export Changes wizard provided you with additional customization options.



Send changes to master file using Specifies whether to send the merge file (the file containing the changes) by means of disk or mail. If you send the file by means of mail, ECCO will automatically import those changes without using the Import Changes command.

Disk file Creates a merge file that you can later copy to your remote computer. Choose the Browse button to specify a filename with a path.

Mail to ECCO sends a mail message with the merge file attached. Choose the Address button to select the recipient of the file.

Send automatically using mail message ECCO periodically sends a merge file using mail. Choose Address to specify the recipient of the file. Specify the days and times you want the messages sent.

Always use Advanced mode dialog Specifies whether to use this Advanced dialog box in place of the wizard when you select Export Changes.

File: Synchronize: Import Changes

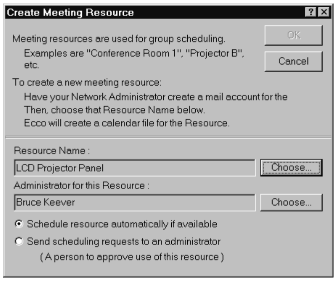
Displays the Export Changes wizard, which takes you step-by-step through the import process to synchronize with the ECCO file currently open. The wizard includes selecting making the transfer by disk or electronic mail.

File: Synchronize: Remote Access Sync

Displays the Remote Access Synchronization dialog box. Use this dialog box to locate your master file if you are connected to the network through a remote access program. You can also use this command to synchronize your ECCO file in a peer-to-peer network environment

File: Create Meeting Resource

Displays the Create Meeting Resource dialog box, in which you can create a shared meeting resource. Meeting resources can include facilities and equipment, such as a conference room, audio-visual equipment, and so forth.



Resource Name Displays the currently selected resource. Use the Choose button to display the Choose Users, Groups, and Resources dialog box and to select the name of a mail account created for a resource (for example, Conference Room).

Administrator for this resource Select a user who will be responsible for maintaining the Calendar for the new resource. Displays the currently selected administrator. Use the Choose button to display the Choose Users, Groups, and Resources dialog box in which you can select another administrator.

Schedule resource automatically if available Select this option if you want other ECCO users to schedule this meeting resource when it is available.

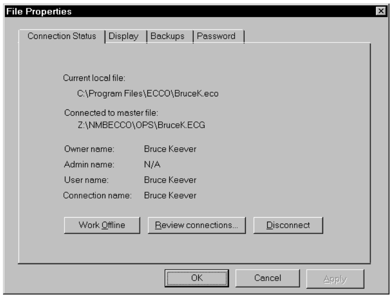
Send scheduling requests to an administrator Select this option to control scheduling of the new resource. When you select this option, other users can “invite” the resource but cannot reserve it. The administrator is responsible for reserving the resource, and must accept or decline the meeting request message on behalf of the resource.

File: Workgroup Settings

Displays the Workgroup Settings wizard, which takes you step-by-step through the connecting to an ECCO Workgroup Directory process. The wizard includes selecting a mail client, setup for connecting to ECCO TCP/IP scheduling servers, and specifying the path to the ECCO Workgroup Directory.

File: Properties

Displays the File Properties property sheet. There four tabs on this display – Connection Status, Display, Backups, and Password.



Connection Status tab

Current local file Displays the filename of the local file you are currently using.

Connected to master file Displays the filename of the master file to which you are currently connected.

Owner name Displays the owner of the file.

Admin name Displays the Administrative Assistant of the file.

User name Displays the current user name.

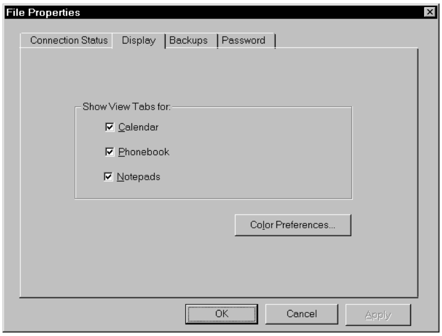
Connection name Displays the connection name. The Connection name is usually a user name unless you are connected to a replica synchronized file, in which case the replica file description appears.

Work Offline/Online button Disconnects you from or reconnects you to the master file.

Review connections button Choose this button to review connections to other local files to disconnect ECCO files that are no longer active from the master file. This button is available only is you are the owner of a shared file.

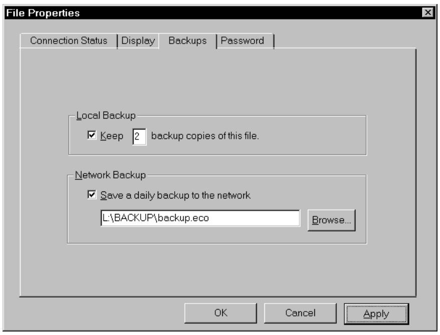
Disconnect button Choose this button to disconnect from the master file, maintaining a copy of all public information in your local ECCO file.

Apply button Becomes active when changes are made to the property sheet. Changes are implemented, but the property sheet remains open.



Display tab

Show View Tabs for	Select which view tabs are displayed – Calendar, PhoneBook, and Notepads.
Color Preferences button	Displays the Color Preferences dialog box, in which you can select different colors for ECCO views.
Apply button	Becomes active when changes are made to the property sheet. Changes are implemented, but the property sheet remains open.

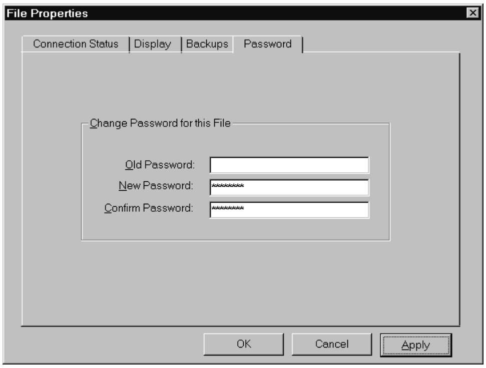


Backups tab

Local Backup	Select whether to keep rotating backup copies (up to nine) of your current ECCO file. Each time you save your file, ECCO creates a new backup copy using the same filename, but with an extension such as .BK1, .BK2, and so forth. The most recent backup will have the extension .BK1. This option is file specific.

Network Backup Select to backup your file automatically across a network.

Apply button Becomes active when changes are made to the property sheet. Changes are implemented, but the property sheet remains open.



Password tab

Old Password Enter the old password for your file. If a password has not been specified previously, leave this field blank. For maximum security, ECCO does not display the characters as you type. An asterisk (*) appears for each character.

New Password Enter the new password for your file.

Confirm Password Enter the news password again for verification.

Apply button Becomes active when changes are made to the property sheet. Changes are implemented, but the property sheet remains open.

File: Database

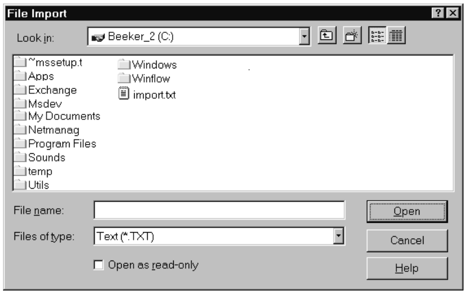
Displays the commands for ECCO database functions, including importing and exporting data, achieving, compacting, testing, data recovery, and checking your group scheduling availability with the ECCO Workgroup Directory.

File: Database: Import

Displays the File Import dialog box, in which you can specify a file to import into the active PhoneBook or Notepad. Before choosing Import from the File menu, switch to the view to which you want to import.

Note: Although you cannot use the Import command to import data into the Calendar, you can convert Calendar data from other programs. For more information, see the chapter or online help on “Importing and Exporting.”

You can import files in either of two formats: TXT (text) or CSV (comma-separated values).



File Name Type here, or select from the list, the name of the file you want to import.

Files of Type Select the type of file you want to import.

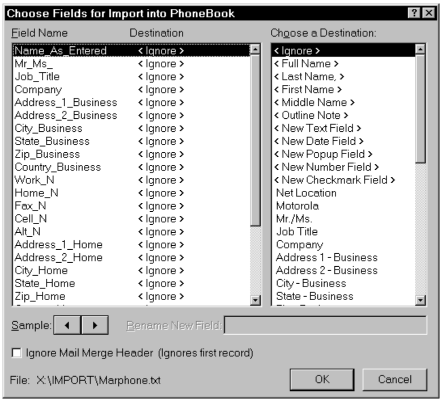
Directories Select a different directory if the file you want to import is not in the current directory.

Look in Select from the list a different drive if the file you want to import is not on the current drive.

After you choose Open in the File Import dialog box, one of the dialog boxes listed below may appear, depending upon the active view and whether you choose to import columns.

Active view	Dialog box
PhoneBook	Choose Fields For Import Into PhoneBook
Notepad	Import Into Current View
Notepad	Choose Columns For Import Fields

Choose Fields for Import into PhoneBook dialog box



Field Name Displays a list of all field names in the file you are importing.

Destination For each field, displays the destination.

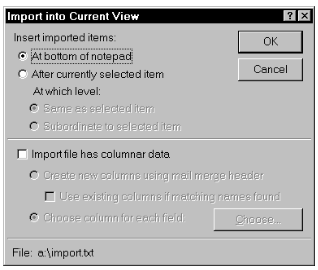
Choose a Destination Choose from this list a destination for the selected field. If you do not want ECCO to import the selected field, choose <Ignore>. To create a new column to import to, select a field name surrounded by angle brackets.

Sample buttons Move through the file you are importing, one record at a time.

Rename New Field If you are creating a new column to import to, type a name for it here.

Ignore Mail Merge Header This will cause the first record of the import file not to be added. This is useful if the first record contains only the header information for the data being imported..

Import into Current View dialog box



Insert imported items Specify where in your outline you want to insert the imported information.

At bottom of notepad Places the imported information at the bottom of the Notepad.

After currently selected item Places the imported information after and at the same level as, or after and subordinate to, the selected item in the active view.

Import file has columnar data Specifies that the import file has data that you want to import into columns.

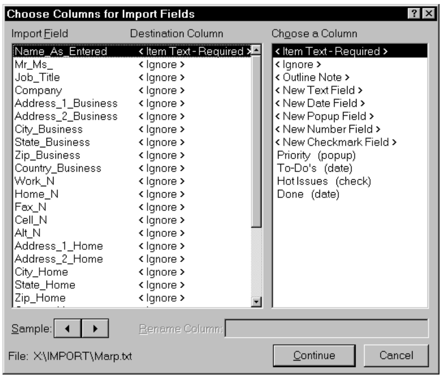
Create new columns using mail merge header Creates new columns based on names in the file’s first record.

Use existing columns if matching names found Imports to existing columns if names in the first record match existing column names.

Choose column for each field Choose a destination column for each field.

Choose button Displays the Choose Columns For Import Fields dialog box, in which you can choose the columns you want to import to.

Choose Columns for Import Fields dialog box



Import Field Displays a list of all field names or sample fields in the file you are importing.

Destination Column For each field, displays the destination column.

Choose a Column Choose from this list a destination column for the selected field. If you do not want ECCO to import the selected field, choose <Ignore>. To create a new column to import to, select a field name surrounded by angle brackets.

If you choose a <New Date Field>, imported items will be shown by default in the Calendar on the dates imported into that column. To override this, choose the Properties command from the Column menu after importing, and then choose Defaults and deselect Show Item In Calendar’s Tickler Section.

Sample buttons Move through the file you are importing one field at a time.

Rename Column If you are creating a new column to import to, type a name for it here.

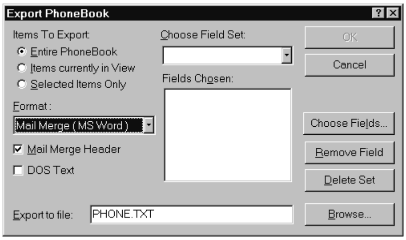
File: Database: Export

Displays a dialog box specific to the active view.

You cannot export from the Calendar.

Active View	Dialog Box
PhoneBook	Export PhoneBook
Notepad	Export Notepad

Export PhoneBook dialog box



Items To Export Specify whether you want to export the entire PhoneBook, items currently displayed in the view, or the selected items only.

Format Displays format options that allow you to export information for use in word-processing, spreadsheet, database, and other programs.

Mail Merge Header Exports field names as the first line in the exported file.

DOS Text Exports the file as a DOS text file.

Choose Field Set Select from the list a field set, or select <Create Set> to display the Choose Field Set dialog box in which you can choose a set of fields to export.

Fields Chosen Displays the columns that will be exported.

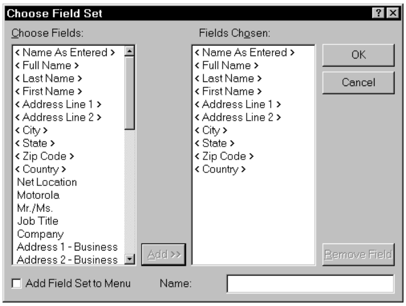
Remove Field button Removes a field from the Fields Chosen list. As a result the field column will not be exported.

Delete Set button Deletes a field set from the Choose Field Set list.

Export to file Type here the name of the file that will contain the exported information.

Browse button Displays the File Export dialog box, in which you can specify an existing file to export to.

Choose Field Set dialog box



Choose Fields Displays a list of the fields in the PhoneBook.

Add button Adds the selected field in the Choose Fields list to the Fields Chosen list.

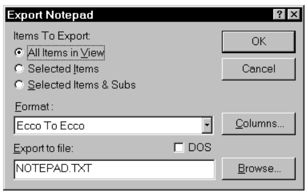
Fields Chosen Displays the list of fields you have chosen to export.

Remove Field button Removes the selected field from the Fields Chosen list.

Add Field Set to Menu Adds the field set to the Choose Field Set list in the Export PhoneBook dialog box.

Name Type here a name for your field set.

Export Notepad dialog box



Items To Export Specify whether you want to export all the items in the Notepad, the selected items only, or the selected items and their subitems.

Format Displays several format options that allow you to export information for use in word-processing, spreadsheet, database, and other programs.

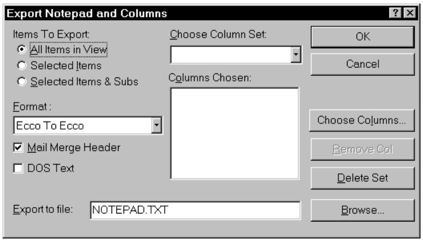
Columns button Displays the Export Notepad And Columns dialog box, in which you can specify which columns you want to export.

DOS Exports the file as a DOS text file.

Export to file Type here the name of the file to which you want to export.

Browse button Displays the File Export dialog box, in which you can specify an existing file to export to.

Export Notepad and Columns dialog box



Items To Export Specify whether you want to export all items in the Notepad, the selected items only, or the selected items and their subitems.

Format Displays format options that allow you to export information for use in word-processing, spreadsheet, database, and other programs.

Mail Merge Header Exports field names as the first line in the exported file.

DOS Text Exports the file as a DOS text file.

Export to file Type here the name of the file to which you want to export.

Browse button Displays the File Export dialog box, in which you can specify an existing file to export to.

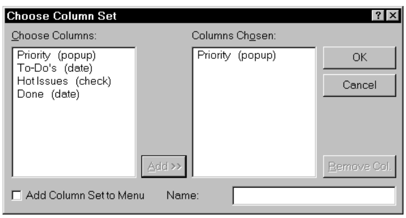
Choose Column Set Select from the list a column set, or select <Create Set> to display the Choose Column Set dialog box, in which you can choose a set of columns to export and create a named columns set.

Columns Chosen Displays a list of the columns in the chosen column set. As a result, the field column will not be exported.

Remove Col. button Removes the selected column from the Columns Chosen list.

Delete Set button Deletes a field set from the Choose Field Set list.

Choose Column Set dialog box



Choose Columns Displays a list of the columns in the active view.

Add button Adds the selected column in the Choose Columns list to the Columns Chosen list.

Columns Chosen Displays the list of columns you have chosen to export

Remove Col. Removes the selected column from the Columns Chosen list.

Add Column Set to Menu Adds the column set to the Choose Column Set list in the Export Notepad And Columns dialog box.

Name Type here a name for your column set.

File: Database: Archive

Save all appointments and ticklers before the date you specify to a separate ECCO file.

Archive Appointments and Ticklers dialog box

Archive items before All appointments and ticklers occurring before the selected dated will be archived.

To file Type in a filename for the ECCO archive file, or choose the Browse button to open the Save As dialog box.

Delete after archiving Select to delete appointments and ticklers after they have been saved to the archive file.

File: Database: Compact

This process removes unused space from your ECCO file to reduce the file size. This feature is most effective after you have deleted a large amount of information from your file.

File: Database: Test

This process checks your file for data consistency. If an error is found, the recovery option will be displayed. If Recovery is unable to resolve the problem, you should begin using one of your backup files which passes this test.

File: Database: Recover

This process will recover data from an ECCO file that has been damaged. It may not be possible to recover all of the data. You can choose between recovering the active open file or a file saved to disk.

File: Database: Test Availability

This process verifies the group scheduling availability information in your local file against the information contained in the ECCO Workgroup Directory database. This scheduling availability information is used by other users for checking your availability. If an error if found, you will be presented with an option to refresh to ECCO Workgroup Directory database.

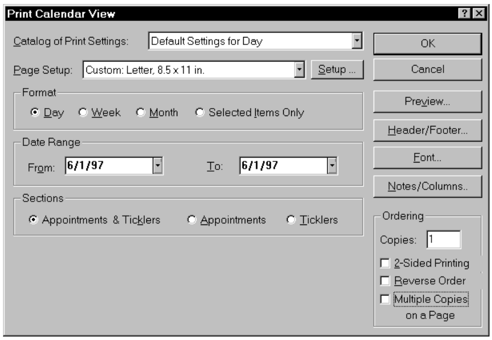
File: Print

Displays a dialog box specific to the active view. For more information about printing, see the chapter or online help on “Printing.”

Active View	Dialog Box
Calendar	Print Calendar
PhoneBook	Print PhoneBook
Notepad	Print Notepad

If you choose the Setup button in any of these dialog boxes, the Page Setup dialog box appears, in which you can specify page size, print areas, margins, page orientation, and create a new named page setup from the settings.

Print Calendar View dialog



Catalog of Print Settings Select an existing print catalog.

Page Setup Select a page setup. Choose the Setup button to display the Page Setup dialog box, in which you can select page setup options and create a new named page setup.

Format Specify a daily, weekly, or monthly format, or specify whether you want to print only the selected items and their subitems.

Date Range Specify the range of dates you want to print.

Sections Select whether you want to print appointments, tickler items, or both.

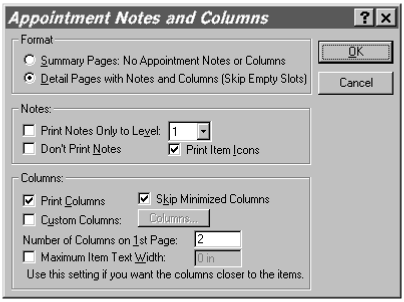
Preview button Displays the Print Preview window, in which you can see how your document will look when printed.

Header/Footer button Displays the Header And Footer dialog box, in which you specify the font and title text you want in the header and footer of your printed document and whether to print page numbers and the current date in the footer.

Font button Displays the Item Text Fonts dialog box, which lets you print using the font and font size in the current view or allows you to specify a custom font and font size.

Notes/Columns button Displays the Appointment Notes And Columns dialog box.

Appointment Notes and Columns dialog box



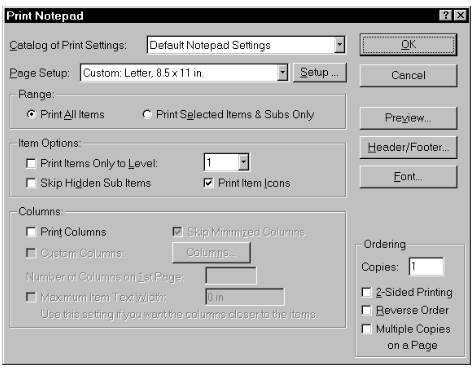
Copies Specify the number of copies you want to print, whether to use two-sided printing (both sides of the page), and whether to print pages in reverse order.

2-Sided Printing Specifies that the printout will be to both sides of the paper.

Reverse Order Specifies that the printer should print starting with the last page first and continue backwards to the first page.

Multiple Copies on a Page Specifies that a page break should not be sent to the printer between each copy.

Outline Notes and Columns dialog box



Format Specify whether you want to print your Calendar with or without outline notes and columns:

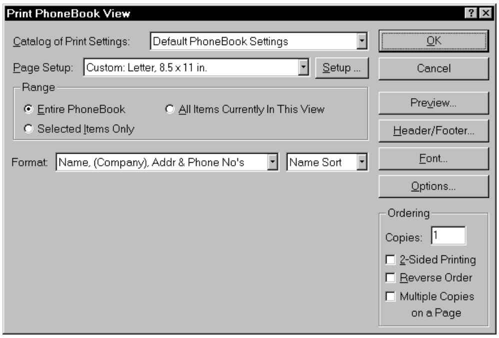
> **Summary Pages: No Outline Notes or Columns** Prints time slots, appointments, and tickler items for the selected day or week; or prints a grid for the selected month. Does not print outline notes, subitems or information in columns.
>
> **Detail Pages with Outline Notes (Skip Empty Slots)** Choose this option to make the following options available.

Outline Notes Specify to what level of subitems you want to print (levels 1 through 9), whether to skip hidden subitems in a collapsed outline, and whether to print item bullets and folder icons.

Columns Specify column printing options:

> **Print Columns** Select to print columns and make the following options available.
>
> **Skip Minimized Columns** Does not print minimized columns. You can minimize a column by double-clicking its column heading.
>
> **Custom Columns** Select to print specific columns. Choose the Columns button to display the Custom Columns dialog box in which you can select the specific columns you want to print, specify their order, and set the size of each column.
>
> **No. of Cols on 1st Page** Specify the number of columns you want printed on the first page.
>
> **Maximum Item Text Width** Specify the maximum width measurement for your items' text.
>
> **2-Sided Printing** Specifies that the printout will be to both sides of the paper.
>
> **Reverse Order** Specifies that the printer should print starting with the last page first and continue backwards to the first page.
>
> **Multiple Copies on a Page** Specifies that a page break should not be sent to the printer between each copy.

Print PhoneBook View dialog box



Catalog of Print Settings Select an existing print catalog.

Page Setup Select a page setup. Choose the Setup button to display the Page Setup dialog box, in which you can select page setup options and create a new named page setup.

Range Print the entire PhoneBook, all items in the current view, or selected item(s) only.

Format Select a format for printing a combination of names, companies, addresses, phone numbers, columns, outline notes, PhoneBook forms, or envelopes, and specify whether to sort items by name or by company.

Preview button Displays the Print Preview window, in which you can see how your document will look when printed.

Header/Footer button Displays the Header And Footer dialog box, in which you specify the font and title text you want in the header and footer of your printed document and specify whether to print page numbers and the current date in the footer.

Font button Displays the Item Text Fonts dialog box, which lets you print using the font and font size in the current view or specify a custom font and font size.

Options button Displays the PhoneBook Options dialog box.

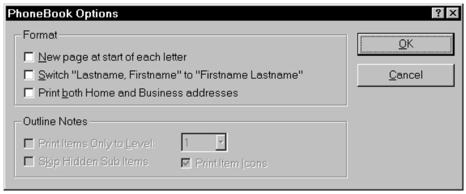
Copies Specify the number of copies you want to print, whether to use two-sided printing (both sides of the page), and whether to print pages in reverse order.

2-Sided Printing Specifies that the printout will be to both sides of the paper.

Reverse Order Specifies that the printer should print starting with the last page first and continue backwards to the first page.

Multiple Copies on a Page Specifies that a page break should not be sent to the printer between each copy.

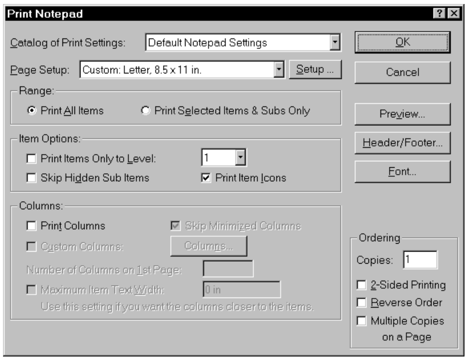
PhoneBook Options dialog box



Format Specify whether you want to print your PhoneBook with a new page at the start of every alphabet letter, whether to switch the order of first and last names, and if both the home and business addresses are to be printed.

Outline Notes Specify to what level of subitems you want to print (levels 1 through 9), whether to skip hidden subitems in a collapsed outline, and whether to print item bullets and folder icons.

Print Notepad dialog box



Catalog of Print Settings Select an existing print catalog.

Page Setup Select a page setup. Choose the Setup button to display the Page Setup dialog box, in which you can select page setup options and create a new named page setup.

Range Print all items in the view or selected item(s) only.

Item Options Specify to what level of subitems you want to print (levels 1 through 9), whether to skip hidden subitems in a collapsed outline, and whether to print item bullets and folder icons.

Columns Specify column printing parameters:

> **Print Columns** Prints columns.
>
> **Skip Minimized Columns** Does not print minimized columns. You can minimize a column by double-clicking its heading.

Custom Columns Select to print specific columns. Choose the Columns button to display the Custom Columns dialog box in which you can select the columns you want to print, specify their order, and set the size of each column.

No. of Cols. on 1st Page Specifies the number of columns you want printed on the first page.

Maximum Item Text Width Specify the maximum width measurement for your items' text.

Preview button Displays the Print Preview window, in which you can see how your document will look when printed.

Header/Footer button Displays the Header and Footer dialog box, in which you specify the font and title text you want in the header and footer of your printed document and specify whether to print page numbers and the current date in the footer.

Font button Displays the Item Text Fonts dialog box, which lets you print using the font and font size in the current view or specify a custom font and font size.

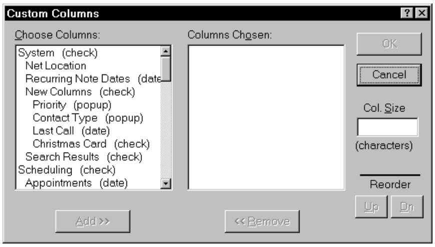
Copies Specify the number of copies you want to print, whether to use two-sided printing, and whether to print pages in reverse order.

2-Sided Printing Specifies that the printout will be to both sides of the paper.

Reverse Order Specifies that the printer should print starting with the last page first and continue backwards to the first page.

Multiple Copies on a Page Specifies that a page break should not be sent to the printer between each copy.

Custom Columns dialog box



Choose Columns Displays a list of the columns in the active view.

Columns Chosen Displays the list of columns you have chosen to print.

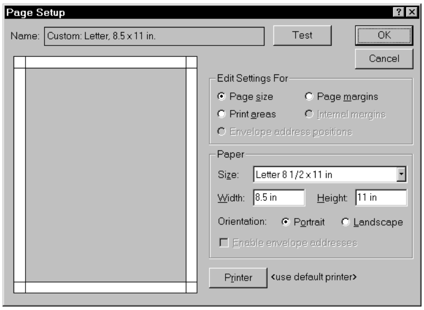
Add button Adds the selected column in the Choose Columns list to the Columns Chosen list.

Remove button Removes the selected column from the Columns Chosen list.

Col. Size Specify the size (number of characters) of each column you print.

Reorder buttons Changes the order in which the selected columns will be printed.

Page Setup dialog box



Name Displays the name of the current page setup.

Test button Prints one page of sample data in the selected format.

Edit Settings For Select the type of page settings you want to change:

> **Page size** Select the paper size, width, height, and orientation (portrait or landscape). Choose the Printer button to display the Print Setup dialog box, in which you can select a printer and specify printer options.
>
> Change the following settings by typing numbers in text boxes or by dragging the yellow rectangles in the example in the dialog box.
>
> **Page margins** Specify top, bottom, left, and right margins for the entire page.
>
> **Print areas** Specify number of columns across and down, the space between columns and rows, and specify whether you want to cut sheets.
>
> **Internal margins** Specify top, bottom, left, and right margins for the individual print areas.
>
> **Envelope address positions** Specify how far return addresses are offset from the upper-left corner of each print area.

Paper Specify the paper you are printing to.

> **Size** Specify the size of the paper.
>
> **Width** Specify the width of the paper.
>
> **Height** Specify the height of the paper.
>
> **Orientation** Specify whether your printing orientation is portrait or landscape.

Enable envelope addresses Specifies that the paper information entered is for envelope printing (and provides margin setups for return and address areas).

Printer Select the printer to use.

When you choose the OK button, ECCO asks you if you'd like to save your settings by a creating a named page setup. To use these pages settings again, choose the Yes button and give the page setup a name.

File: Print Catalog

Creates a print catalog (a named set of selected printer options), manages an existing print catalog, or prints the current view using the selected saved print catalog.

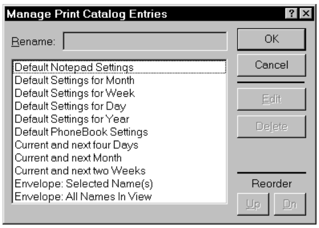
Print Catalog: New

Opens the New Print Catalog dialog box specific to the active view, which contains the same print settings options as the Print dialog box for the active view. Select the settings you want, and name the new print catalog to add it to the Print Catalog menu.

Print Catalog: Manage

Displays the Manage Print Catalog Entries dialog box, in which you rename or delete existing print catalogs or reorder them on the menu.

Manage Print Catalog Entries dialog box



Rename Type here the new name you want to give the selected print catalog.

Edit button Edit the selected print catalog.

Delete button Deletes the selected print catalog.

Reorder buttons Move the selected print catalog(s) up or down one row at a time on the Print Catalogs menu.

Print Catalog: <Print Catalogs>

Lists the available print catalogs. Choosing a print catalog prints the active view using the print settings of the selected catalog.

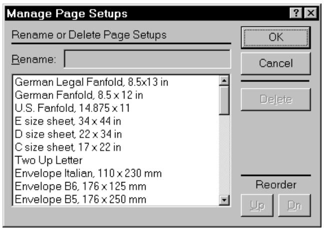
File: Printer Setup

Displays the Choose ECCO Default Printer dialog box, in which you can select a printer and specify printer options.

File: Manage Page Setups

Displays the Manage Page Setups dialog box, in which you rename or delete existing page setups or reorder them on the menu.

Manage Page Setups dialog box



Rename Type here the new name you want to give the selected page setup.

Delete button Deletes the selected page setup.

Reorder buttons Move the selected page setup(s) up or down one row at a time in the list in the Print Notepad dialog box, the Print Calendar View dialog box, and the Print PhoneBook View dialog box.

File: <Recently Opened Files>

Lists the last four opened files. Choose a filename to reopen the file.

File: Exit

Quits the ECCO program. If you have selected the Autosave On File Close option in the ECCO Preferences dialog box, ECCO automatically saves any changes to the file; otherwise, ECCO prompts you to save any changes before quitting the program.

Edit Menu

This menu includes commands for tasks such as editing text, finding and replacing text, and creating links and embedded objects.

Edit: Undo

Undoes the previous editing or formatting action.

Edit: Cut

In general, this command cuts the selected information from the active view and copies it onto the Clipboard, from where it can be pasted into another location.

Cutting items or sub-items Cuts the items from an ECCO file if the items and all of their subitems have been added to only one folder.

Displays the Cut Items dialog box if the item or any of its subitems exist in more than one view. Selecting the From Folder: <folder name> option deletes the item and its subitems from the selected folder, but the items remain in all other folders to which they have been added. Does not copy the cut items onto the Clipboard. Selecting the Cut Entirely From File (All Views) option deletes the item and its subitems from all views in your ECCO file and places them on the Clipboard.

Cutting folders from a Notepad Cuts the selected folders from the active view only. Does not place the cut folders onto the Clipboard; the Paste command is not available. Does not remove folders from the folder window or any other view.

Cutting folders from the Folder window Cuts the selected folders and their subfolders from all views in your ECCO file. You can't cut any of the default folders, such as PhoneBook and Appointments.

If the deleted folder was the only folder in a Notepad, ECCO creates a new untitled folder.

To cut folders in the folder window, you must have already chosen Edit Folders from the Folder menu.

Edit: Copy

Copies the selected information onto the Clipboard.

Edit: Paste

Pastes the contents of the Clipboard into the location you specify with the insertion point.

Edit: Paste Special

Pastes the contents of the Clipboard as an OLE link or as an embedded OLE object into the location you specify with the insertion point.

Edit: Delete Items

In general, choosing this command deletes the selected items from the active view without copying them onto the Clipboard.

Items or subitems are deleted from ECCO if the items and all of their subitems have been added to only one folder.

The Delete Items dialog box appears if the items or any of their subitems have been added to more than one folder. Selecting the Delete Entirely From File (all Views) option deletes the item and its subitems from all views in your ECCO file.

Edit: Remove Folders

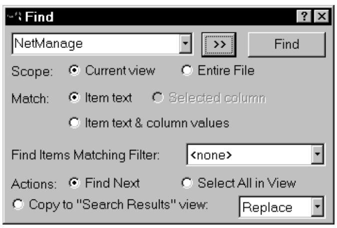
Removes the selected folders from the active Notepad or Calendar without copying them onto the Clipboard. This command does not remove any items from the folders. It also does not remove the folders from any other view or from the folder window.

Edit: Find

Allows you to find information in the active view or gather information from an entire file into a Search Results view. When you first open it, the Find dialog box is displayed in a collapsed state.

To display the entire Find dialog box, click the Unfold button (>>). (If you opened this dialog box by choosing the Find Folder command, the Unfold button and other options are not available.)

Find dialog box



Find box Type here the text you want to find.

Drop-down arrow button Displays a list of your previous search requests. This list is saved with the file and is available from session to session.

Unfold (>>) button   Expands and hides the Find dialog box.

Find button Begins the search. Depending on the search parameters, this button might be labeled **Collect All**.

Scope Specify the current view or the entire file as the scope of your search:

> **Current View** Limits the search to the active view. In the Calendar, this option changes to **Future Dates**, and limits the search to Calendar items from the currently selected day and all future dates.

Entire File Includes in the search all items in the file.

Match Specify whether to search for the text within items, within columns, or both.

Find Items Matching Filter Find only those items with criteria that match the specified filter. You can search for items matching filters without typing text in the Find box. Select a named filter, or select Custom to display the Use Custom Filter dialog box, in which you can specify parameters for your filter. For more information, see the chapter or online help on “Other ECCO Features.”

Actions Specify whether you want to find the next instance of the specified item, select all instances, or copy the found items to the Search Results notepad:

Find Next Finds the next instance of the specified item.

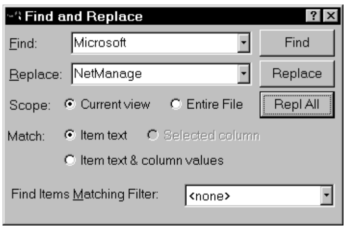
Select All in View Selects all the items in the active view that meet the search criteria.

Copy to Search Results view Copies the found items to the Search Results notepad. Specify whether you want ECCO to replace all the found items in the Search Results notepad with the newly found items or append the newly found items to the contents of the Search Results notepad.

Edit: Find/Replace

Displays the Find and Replace dialog box, in which you can specify the text you want to find and the text with which you want to replace it.

Find and Replace dialog box



Find box Type here the text you want to find.

Drop-down arrow button Displays a list of your previous search text. This list is saved with the file and is available from session to session.

Find button Begins the search. Depending on the search parameters, this button might be labeled **Collect All**.

Replace box Type here the text with which you want to replace the found text. If you leave this box empty, ECCO will delete all instances of the found text when you choose the Replace button.

Replace button Replaces the current instance of the found text with the text you specified.

Repl All button Replaces all instances of the found text with the text you specified.

Scope Specify the scope of your search:

> **Current View** Limits the search to the active view.
>
> **Entire File** Includes in the search all items in the file. When you choose this option, the Find button changes to the Collect All button and makes the Replace and Repl All buttons unavailable. All found items will be displayed in the Search Results notepad.

Match Specify whether to search for the text within items, within column values, or both.

Find Items Matching Filter Find only those items with criteria that match the specified filter. You can search for items matching filters without typing text in the Find box. Select a named filter or select Custom to display the Use Custom Filter dialog box, in which you can specify parameters for your filter.

Edit: Find Next

Finds the next instance of the text you most recently searched for.

Edit: Go To Pane

Switches you to different panes in the active window.

Left <-> Right Opens the column pane or switches you to or from the column pane.

Top <-> Bottom In a Notepad, this command splits the active window or switches you between top and bottom panes of the window. In the Calendar, this command switches you between the Appointment section and the Tickler section. In the PhoneBook, this command switches you between the PhoneBook list and the PhoneBook entry form.

Edit: Insert

Displays a menu in which you can specify the line, tab, or object you want to insert.

Edit: Insert Date Stamp

Inserts date and time at the insertion point when you are editing an item.

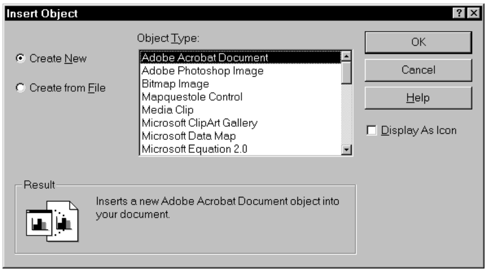
Edit: New Line

Begins a new line at the insertion point when you are editing an item.

Edit: Insert: Tab

Inserts a tab at the insertion point when you are editing an item.

Edit: Insert: Object



Inserts an object into your ECCO file, such as a Paintbrush Picture or WordPad Document.

Edit: Links

Displays the Links dialog box, in which you can specify options that let you change or update existing OLE links in your file. You create OLE links by sending information to ECCO using the Shooter.

Link list Lists the links in the active file.

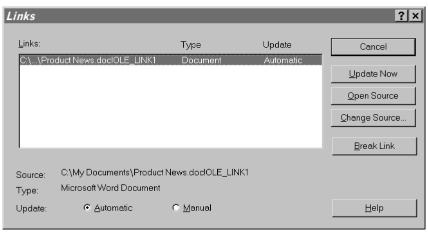
Update Now button Updates the selected link.

Change Link button Displays the Change Link dialog box, in which you can choose a file for a new link.

Update Options Lets you specify whether the links are updated automatically or by you on a case-by-case basis.

Edit: Objects

Lets you modify the selected OLE object's size or open the program in which the object was originally created and make changes to the object, without leaving ECCO. When an object is selected, the command name changes to reflect the name of the program with which the object was created and indicates whether or not the object is linked.



Edit: Objects: Minimize

Reduces the selected object to a minimized size.

Edit: Objects: Adjusted Size

If the selected object is minimized or is in its original size, returns the object to its previous resized state.

Edit: Objects: Original Size

If the selected object has been minimized or resized, returns it to the size it was when you first embedded it.

Edit: Objects: Edit

Opens the program in which the selected embedded or linked object was created so you can edit it.

Edit: Objects: <Other>

Displays other options provided by the program used to create the OLE object.

View Menu

Commands on the View menu allow you to work with all the ECCO views, including adding or removing views from the current window and making the active view public, and reading meeting mail.

You also use this menu to display the folder window and choose folders to display in the current Notepad.

View: Calendar

Makes the Calendar the active view.

View: PhoneBook

Makes the PhoneBook the active view.

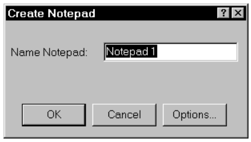
View: Notepads

Creates new Notepads, manages existing Notepads, or makes an existing Notepad the active view.

View: Notepads: New Notepad

Displays the Create A New Notepad View dialog box, in which you can create and name a new Notepad.

Create Notepad dialog box



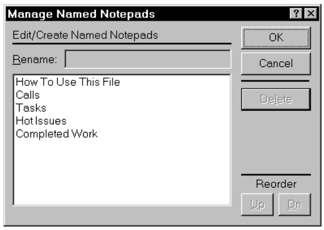
Name Type here a name for your view.

Options button Displays the Create Notepad Options dialog box, in which you can select folders to include in your Notepad.

View: Notepads: Manage

Displays the Manage Named Notepads dialog box, in which you can rename or delete existing Notepads or reorder them on the menu.

Manage Named Notepads dialog box



Rename Type here the new name you want to give the selected view.

Delete button Deletes the selected Notepad.

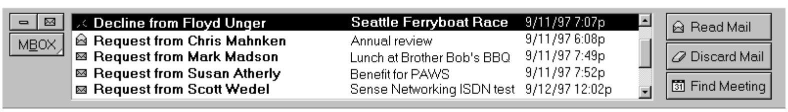
Reorder buttons Move the selected Notepad(s) up or down one row at a time on the Notepad menu.

View: Notepads: <Notepad Views>

Displays a list of Notepads. Choosing a Notepad switches you to that view and makes it the active view.

View: Meeting Mail

Opens the meeting message window, which displays a list of the electronic mail messages associated with scheduled meetings. The meeting message window can be opened or closed in any ECCO view.



Read Mail button Choose this button to open the select meeting mail message.

Discard Mail button Choose this button to discard without opening the selected meeting message.

Find Meeting button Choose this button to move the Calendar view to the day of the meeting being requested.

View: Folder Window

Displays and hides the folder window.

View: Add View To Window

Displays a list of all views in the ECCO file, from which you can select a view to add to the current window. A window can contain up to four views. Any items, columns, or folders you add to a view in one window are reflected in any other instances of that view in other windows.

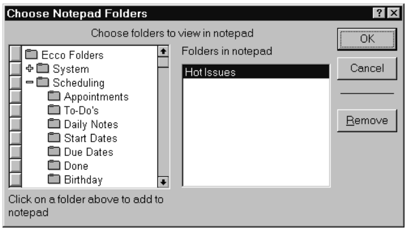
View: Remove View From Window

Removes the selected view from the current window. You cannot remove the view that has the same name as the window.

View: Choose Notepad Folders

Displays the Choose Notepad Folders dialog box, in which you choose the folders whose items you want to display in the active Notepad. For more information, see the chapter or online help on “Folders.”

Choose Notepad Folders dialog box



Choose folders to view in notepad Choose one or more folders from the folder window by clicking a folder button or name.

Folders in notepad Displays the list of folders whose items will be displayed in the Notepad.

Remove button Removes the selected folder from the view.

View: Make View Public

Displays a confirmation dialog box, in which you can make the current view public.

This command is valid only if you’ve previously shared the file by choosing the Share This File subcommand from the Network command on the File menu.

Item Menu

With commands on the Item menu, you can insert, move, and display items in various ways, mark items as done, show an item’s column or folder values, and make items private.

Item: Add Item

Inserts a new item below the selected item.

In the folder window, choosing Add Item inserts a new, untitled folder after the selected folder.

Item: Add Item Right

Inserts a new subitem below and to the right of the currently selected item.

In the folder window, choosing this command inserts a new, untitled subfolder below and to the right of the selected folder.

Item: Add Item Left

Inserts a new item below and to the left of the currently selected item.

In the folder window, choosing Add Item Left inserts a new, untitled folder below and to the left of the selected folder.

Item: Split Item

Cuts the item text to the right of the insertion point, creates a new item at the same level, and pastes the cut text into the new item.

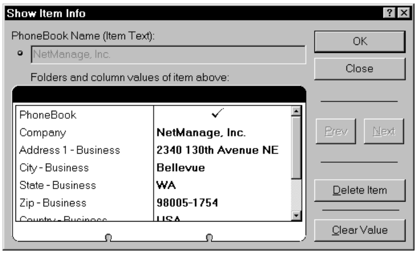
Item: Join Items

Merges the selected items into a single item. The merged item retains the folder values of only the first selected item.

Item: Show Item Info

Displays the Show Item Info dialog box, in which you can view all columns or folders to which the selected item has been added, edit the values associated with the item, or delete the item.

Show Item Info dialog box



Item Text Displays the text of the selected item.

Folders and column values of item above Displays a list of the columns or folders associated with the selected form. Click to the right of each column or folder name to create or change the value to be associated with the item.

Prev and Next buttons Let you move through the items in the active view while you are in the dialog box. You can move up or down the outline at the same level, or move from one level to another.

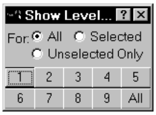
Delete Item button Removes the selected item from all views.

Clear Value button Removes the item from the selected folder or column.

Item: Show Levels

Displays the Show Levels dialog box, in which you can hide and expand your outline level by level by clicking the level number buttons.

Show Levels dialog box



All Select this option to affect your entire outline.

Selected Select this option to affect only the selected items and their subitems.

Unselected Only Select this option to affect your entire outline with the exception of the selected items. This is useful if you want to collapse every item other than the selected items (to see the context of the selected items more clearly).

Item: Show Sub-Items

Displays or hides subitems of the selected items.

Item: Show Sub-Items: Hide

Hides all subitems of all selected items. This command is available when selected items are expanded.

Item: Show Sub-Items: Expand

Displays all subitems that were displayed before the items were last hidden. This command is available when selected items are collapsed.

Item: Show Sub-Items: All Subs

Displays all subitems of all selected items.

Item: Show Sub-Items: 1 Level Only

Displays one level of subitems below each of the selected items.

Item: Move Items

Moves the selected items up, down, left, or right.

Item: Move Items: Up

Moves the selected items and their subitems up one position, but does not change their outline level.

Item: Move Items: Down

Moves the selected items and their subitems down one position but does not change their outline level.

Item: Move Items: Left

Moves the selected items and their subitems left (promotes them) one level.

Item: Move Items: Right

Moves the selected items and their subitems right (demotes them) one level.

Item: Mark As Done

Marks the selected items or subitems as done. You can specify that To-Do's and other tickler items remain shown in the Calendar until they are marked done. Choosing this command removes such items from the Calendar, even if the command is applied to the item within another view. Marking an item as done also adds it to the Done folder. Most templates have a Completed Work notepad where items will appear when they have been marked as done.

Item: Make Item Private

Makes the selected items and their subitems private or reverses that action. You can choose this command for items even if they have not been shared. When the view containing those items is made public, the items will remain private.

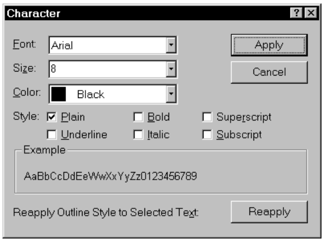
Format Menu

Commands on the Format menu let you format the text of items and outline levels and specify the type of outline labels you want to use.

Format: Character

Displays the Character dialog box, in which you can specify character formats or apply an outline style to previously formatted text.

Character dialog box



Font Displays the selected text in the font you specify.

Size Displays the selected text in the point size you specify.

Color Displays the selected text in the color you specify.

Style Displays the selected text in the style you specify. You can select more than one attribute at a time.

Example Displays text with the attributes you've specified.

Apply button Applies the specified attributes to the selected text. If you hold down the CTRL key while you choose this button, ECCO applies the specified attributes to the outline style for the levels of the selected items.

Reapply button Reapplies the outline style associated with the outline level of the selected text, removing any character formatting you've applied.

Format: Font

Formats the selected text in the font you specify (such as Arial or Times New Roman). Choose More to display more fonts.

Format: Size

Formats the selected text in the point size you specify.

Format: Style

Formats the selected text in the style you specify (plain, bold, italic, underline, superscript, and subscript).

Format: Color

Formats the selected text in the color you specify.

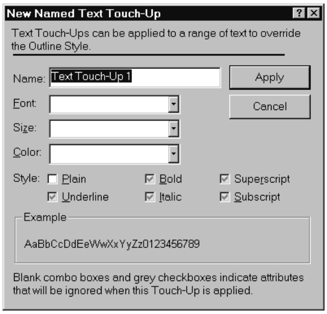
Format: Text Touch-Ups

Displays a menu that allows you to create, edit, or apply a text touch-up, which is a custom set of character attributes (font, size, color, and style). Text touch-up styles override outline styles.

Format: Text Touch-Ups: New

Displays the New Named Text Touch-Up dialog box, in which you can create a custom set of character attributes for the selected text.

New Named Text Touch-Up dialog box



Name Type here a name for your text touch-up.

Font Displays the selected text in the font you specify.

Size Displays the selected text in the point size you specify.

Color Displays the selected text in the color you specify.

Style Displays the selected text in the style(s) you specify (plain, underline, bold, italic, superscript, and subscript).

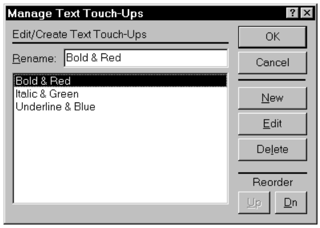
Example Displays text with the attributes you've specified.

Apply button Applies the specified text touch-up to the selected text.

Format: Text Touch-Ups: Manage

Displays the Manage Text Touch-Ups dialog box, in which you can create a new text touch-up, rename or edit an existing text touch-up, delete a text touch-up, or reorder the list of text touch-ups .

Manage Text Touch-Ups dialog box



Rename Type here the new name you want to give the text touch-up.

New button Displays the New Named Text Touch-Up dialog box.

Edit button Displays the Edit Named Text Touch-Up dialog box (identical to the New Named Text Touch-Up dialog box), in which you can modify an existing touch-up.

Delete button Deletes the selected text touch-up.

Reorder buttons Move the selected touch-up(s) up or down one row at a time on the Text Touch-Ups menu. You might want to move the touch-ups you use most often to the beginning of the list.

Format: Text Touch-Ups: <Named Text Touch-Up>

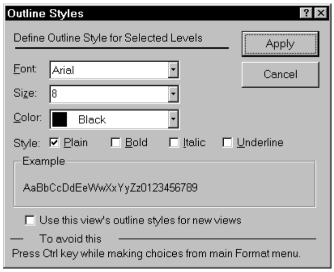
Displays a list of existing text touch-ups. When you select a text touch-up from the list, ECCO applies it to the highlighted text.

If you hold down the CTRL key while you choose the text touch-up, ECCO applies the attributes of the touch-up to the outline styles for the selected items.

Format: Outline Styles

Displays the Outline Styles dialog box, in which you define a style (font, size, color, and style) for all items of the selected level in your outline.

Outline Styles dialog box



Font Displays the outline level in the font you specify.

Size Displays the outline level in the point size you specify.

Color Displays the outline level in the color you specify.

Style Displays the outline level in the style(s) you specify (plain, bold, italic, and underline).

Example Displays text with the attributes you've specified.

Use this view's outline styles for new views Select to set these outline styles as the default for new views you create.

Apply button Applies the specified attributes to the outline level.

Format: Outline Labels

Displays or hides outline labels and allows you to create new or edit existing outline labels. This command is not available in either the Calendar or the PhoneBook.

Format: Outline Labels: Show Labels

Shows or hides all labels in the outline.

Format: Outline Labels: Skip Label & Icon

Skips the label for the selected items and hides the item bullet, but resumes the labeling sequence with the next item.

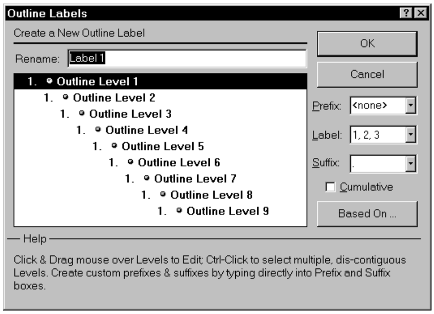
Format: Outline Labels: Restart Sequence

Restarts the labeling sequence beginning with the selected items.

Format: Outline Labels: New

Displays the Outline Labels dialog box, in which you can create custom label formats (for example, I, II, III; 1, 2, 3; A, B, C) for selected outline levels.

Outline Labels dialog box



Rename Type here a name for the outline label you are creating.

Prefix Choose or type the prefix you want displayed in front of the label. The prefix can be up to two characters long.

Label Choose a Roman or Arabic numeric or an alphabetic format for the label (for example, I, II, III; 1, 2, 3; A, B, C).

Suffix Choose or type the suffix you want displayed behind the label. The suffix can be up to two characters in length.

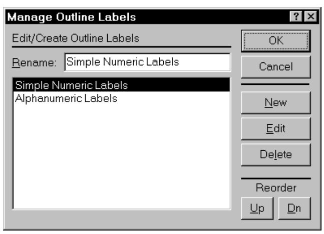
Cumulative For a given level, displays the labels for all levels to its left. This feature is useful for tracking item levels in long documents.

Based On button Displays a dialog box, in which you can apply attributes of an existing label to all levels or to selected levels only.

Format: Outline Labels: Manage

Displays the Manage Outline Labels dialog box, in which you can edit, delete, reorder, and rename existing outline labels. You can also create a new outline label from this dialog box.

Manage Outline Labels dialog box



Rename Type here the new name you want to give the outline label style.

New button Displays the Outline Labels dialog box, in which you can create a new outline label style.

Edit button Displays the Outline Labels dialog box, in which you can edit an existing outline label style.

Delete button Deletes the selected outline label style.

Reorder buttons Move the selected outline label(s) up or down one row at a time on the Outline Labels menu.

Format: Outline Labels: <Named Outline Labels>

Lists all existing outline labels. Choose a name to apply a set of labels to the active view. The default named set of outline labels is called Simple Numeric Labels.

Tools Menu

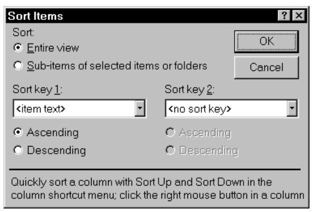
Commands on the Tools menu let you sort items; insert files into ECCO; launch other programs from ECCO; manage alarms and tickler items; customize the toolbar; specify ECCO default preferences; and display or hide the column grid, dialog alerts, and the Shooter.

You can also apply a filter to see only items with values that match criteria you specify, and create forms that automate your work by adding items and their values to several folders at once.

Tools: Sort View

Displays the Sort Items dialog box, in which you can sort items or subitems subordinate to the selected folders or items in the active view.

Sort Items dialog box



Entire view Sorts all top-level items in the active view. In the Calendar, this option changes to Tickler Sections and sorts all items displayed in the Tickler section.

Sub-items of selected items or folders Sorts the subitems of the selected items or folders.

Sort key 1 Select a column or item text as your primary sort key.

Sort key 2 If appropriate, select a column or item text as your secondary sort key.

Ascending Sorts items in ascending order. If the selected column is a pop-up list, items whose value is first in the list will be sorted first.

Descending Sorts items in descending order.

Tools: Filter View

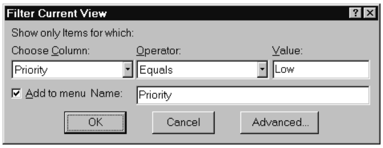
Filters allow you to limit the display of items in the view to those items that meet the criteria you specify.

Commands on this menu let you create a new filter, edit an existing one, ignore a filter and see all the information in a view, or apply an existing filter to a view. A checkmark appears next to the name of any filter currently in use.

Tools: Filter View: New

Displays the Filter Current View dialog box, in which you can create a filter and display specific information contained in the view. After you create a new filter, it is applied to the active view.

Filter Current View dialog box



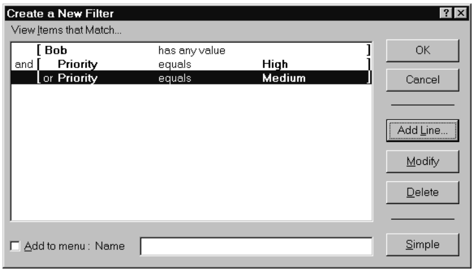
Show only Items for which Specify a column, operator, and value for your filter:

> **Choose Column** Displays a list of the columns currently displayed in your active view.
>
> **Operator** Displays a list of comparison phrases (equals, greater than, less than, and so on).
>
> **Value** Type here a comparison value, if applicable.

Add to menu Type here a name for your filter to save it and add it to the Filter menu for use in other views. Filters added this way are also available to you from the Find and Find And Replace, dialog boxes. This option is available only if the selected column has a heading.

Advanced button Displays the Create A New Filter dialog box and the Add To Filter dialog box, in which you can specify multiple folders and sets of criteria for your filter.

Create a New Filter dialog box



View Items that Match Displays the list of columns (and column values) and folders (and folder values) that are the criteria for the filter.

Add Line button Displays the Add to Filter dialog box, in which you specify the column or folder, value, and operator for each criterion, and specify whether you want items to match more than one criteria (And) or any of the criteria (Or). Choose the Add button to add one or more criteria. When you are finished adding criteria, choose the Close button to return to the Create a New Filter dialog box.

Modify button Displays the Modify Filter dialog box, similar to the Add to Filter dialog box, in which you can change the criteria for the filter.

Add to menu Type here a name for your filter to save it and add it to the Filter menu. These same filters are also available to you from the Find and Find And Replace dialog boxes.

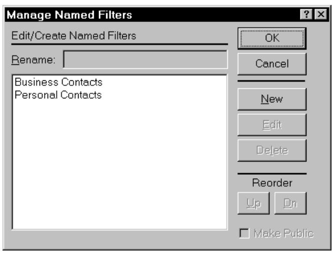
Delete button Removes the selected criterion from the Criteria list.

Simple button Redisplays the Filter Current View dialog box.

Tools: Filter View: Manage

Displays the Manage Named Filters dialog box, in which you rename or delete existing named filters or reorder them on the menu.

Manage Named Filters dialog box



Rename Type here the new name you want to give the selected filter.

New button Displays the Create a New Filter dialog box, in which you can create a new filter.

Edit button Displays the Edit A Named Filter dialog box (identical to the Create A New Filter dialog box) and the Add To Filter dialog box, in which you can modify an existing filter.

Delete button Removes the selected filter.

Reorder buttons Move the selected filter(s) up or down one row at a time in the Filters menu.

Tools: Filter View: Ignore Filter

Ignores the applied filter and displays all information contained in the view. When chosen again, this command restores the filter .

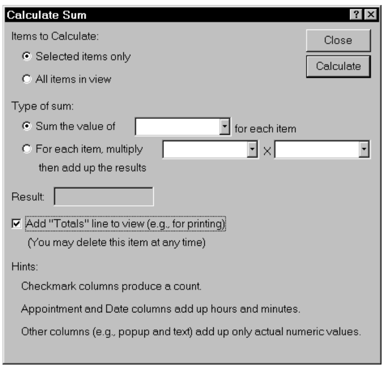
Tools: Filter View: <Named Filters>

Applies the filter to the active view, displaying only those items that match the filter.

Tools: Sum

Displays the Calculate Sum dialog box, in which you can specify columns for which you want to calculate a numeric total.

Calculate Sum dialog box



Items to Calculate Specify whether you want to calculate a sum of the selected items only or all items in the view.

Type of sum Choose whether you want to total the values in one column or multiply one column by another column and total the results. From the drop-down lists, select the columns whose values you want to use.

Result Displays the result of the sum, after you choose the Calculate button.

Calculate button Calculates the sum for the columns you specified.

Tools: New Form

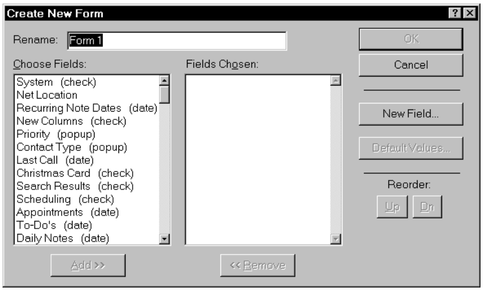
Displays the Create New Form dialog box, in which you can create a form. The forms created here can be used with the Add New Item By Form, View Item By Form, and Apply Form To Items commands.

Create New Form dialog box

The options in the following dialog box are also available in the Edit Form dialog box, which appears when you choose the Edit button in the Manage Forms dialog box.

Choose a folder or column to add to your new form.

Create New Form dialog box



Rename Type here a name for your form.

Choose Fields Displays a list of columns or folders you can add to the new form.

Fields Chosen Displays a list of the columns or folders you have added to the new form.

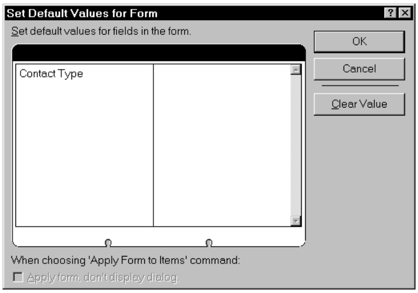
Add button Adds the selected column(s) or folder(s) to the new form.

Remove button Removes the selected column(s) or folder(s) from the new form.

New Field button Displays the New Field & Column dialog box, in which you can create a new column or folder to add to your form and specify the column or folder type.

Default Values button Displays the Set Default Values For Form dialog box.

Set Default Values for Form dialog box



Reorder buttons Move the selected column(s) or folder(s) up or down in the Folder list one row at a time.

Set default values for fields in the form Click to the right of each column or folder name to create or change the default value to be associated with the item when the form is applied.

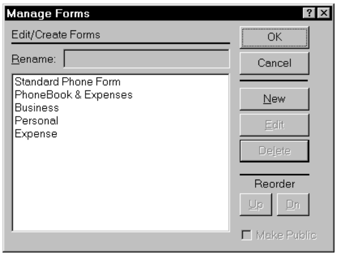
Apply form, don't display dialog When you next choose the Apply Form To Items command, the form will be applied using its default settings, without displaying the Apply Form dialog box. This option is available only when all columns or folders have default values.

Clear Value button Removes the selected default value.

Tools: Manage Forms

Displays the Manage Forms dialog box, in which you rename or delete existing forms or reorder them on the menu.

Manage Forms dialog box



Rename Type here the name you want to give the selected form.

New button Displays the Create New Form dialog box, in which you can specify options to create a new form.

Edit button Displays the Edit Form dialog box, in which you can edit the settings for the selected form. This dialog box is identical to the Create New Form dialog box.

Delete button Deletes the selected form or forms.

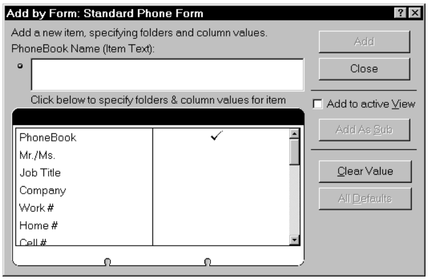
Reorder buttons Move the selected form(s) up or down one row at a time on the Forms menu.

Make Public Makes the selected form(s) public. When a form is shared, it is available to other users. This option is valid only if you've previously made the ECCO file available by choosing the Share This File subcommand from the Network command on the File menu.

Tools: Add New Item By Form

Displays a list of named forms. Choosing a named form displays the Add By Form dialog box for that form. In this dialog box, you can specify options to create a new item and add it to ECCO by form without having to first add it to any specific view.

Add by Form dialog box



Add a new item, specifying folders and column values Type here the text of your item.

Click below to specify folders & column values for the item above Displays a list of the columns or folders associated with the selected form. Click to the right of each column or folder name to create or change the value to be associated with the item.

Add button Adds the item to the form's folders and lets you continue adding items.

Close button Closes the Add By Form dialog box when you are done adding items.

Add to active View Adds the item to the active view and either enters values for the form's columns or adds the item to the form's folders.

Add As Sub button Adds the item as a subitem to the selected item in the active view.

Clear Value button Prevents the item from being given a column value or from being added to the selected folder.

All Defaults button Restores the default values of all columns as defined in the form.

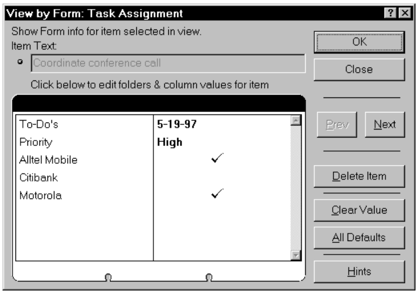
Tools: View Item By Form

Allows you to

- View and edit individual items by form.
- See which of the form's folders and columns the item is in.
- See each item's associated column values.
- Navigate through the items in a view and see and edit their folders and column values in a form. For a better understanding of folder values, see the chapter or online help on "Folders."

Displays a list of existing forms. When you select a form from the list, the View By Form dialog box is displayed. In this dialog box, you can view and edit the selected item's folders, columns, and associated values for the form you chose. You can also use the Next button in this dialog box to move sequentially through a view and see the form's folders, columns, and values for each item.

View By Form dialog box



Show Form info for item selected in view Displays the text of the selected item.

Click below to edit folders & column values for the item above Displays a list of the columns or folders associated with the selected form. Click to the right of each column or folder name to create or change the value to be associated with the item.

Prev and Next buttons Navigate through the items in the active view, displaying each item's columns and associated values by form. You can move up or down the outline at the same level or move from one level to another.

Delete Item button Deletes the selected item(s).

Clear Value button Removes the item from the selected column or folder.

All Defaults button Restores the default values of all columns as defined in the form.

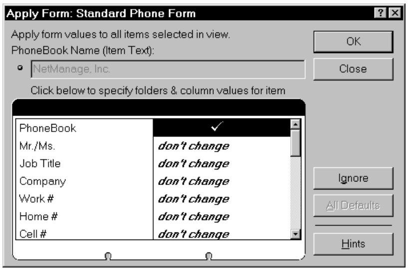
Hints button Displays some helpful hints on forms.

Tools: Apply Form To Items

Displays a list of existing forms. When you select a form from the list, ECCO displays the Apply Form dialog box, in which you can set column values and apply the form to the currently selected items in the active view. Allows you to put multiple items into a set of folders or columns at one time and associate values for those items with each of the columns in the form.

If you selected the Don’t Display Dialog checkbox when you created the form, ECCO applies the default columns and values in the form to the selected items without displaying the Apply Form dialog box.

Apply Form dialog box



Item text Displays the text of the selected item.

Click below to specify folders & column values for the item above Displays a list of the columns or folders associated with the selected form. Click to the right of each column or folder name to create or change the value to be associated with the item.

Ignore button Prevents the item from being given a column value or from being added to the selected folder.

All Defaults button Restores the default values of all columns or folders as defined in the form.

Tools: Get Disk Files

Inserts file, directory, or program names into ECCO.

Tools: Get Disk Files: From File Manager/Explorer

Opens the File Manager if running Windows NT 3.5x or Windows Explorer if under Windows 95 or Windows NT 4.0 or later, from which you can insert references to one or more files, directories, or programs into ECCO by using the Shooter.

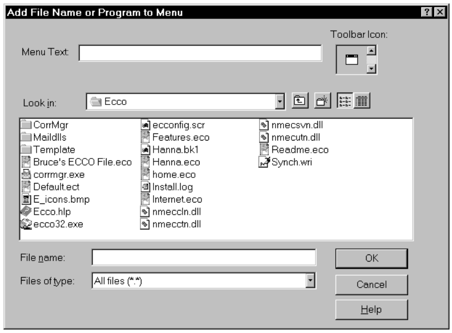
Tools: Get Disk Files: Browse, Add As Item

Opens the Choose File Name To Paste dialog box in which you can select a file to insert as a reference in ECCO.

Tools: Get Disk Files: Browse, Add To Menu

Opens the Add File Name Or Program To Menu dialog box in which you can select a program application, batch file, and so forth to add to your ECCO menu.

Add File Name or Program to Menu dialog box



Menu Text Type in the text you want displayed on the Get Disk Files menu. If you leave this blank, ECCO automatically supplies the filename.

File Name Select the file that you want added to the menu.

Files of Type Select the type of file—program files (*.EXE, *.PIF, *.BAT) or all files (*.*) — that you want displayed in the files list box.

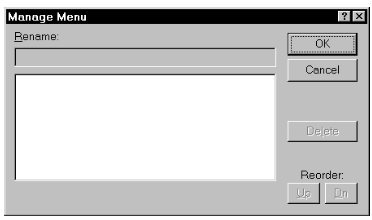
Look in box Select the drive where the file is located if the file is on another drive.

Toolbar icon Select a toolbar icon for this menu item by clicking the up and down arrows to the right of the icon.

Tools: Get Disk Files: Manage Menu

Opens the Manage Menu dialog box in which you can rename, delete, or reorder programs on the Get Disk Files menu.

Manage Menu dialog box



Rename Type the new name you want to give the selected program. This new name will then appear on the Get Disk Files menu.

Programs box Select the program item that you want to change.

Delete Removes the selected program item from the Get Disk Files menu.

Reorder buttons Moves the selected program item up or down in the Get Disk Files menu.

Tools: Get Disk Files: < Files to Launch >

Launches the named file.

Tools: Launch

When a filename is selected, choosing this command launches the program and opens the file. When an executable file (which has an .EXE file extension) is selected, choosing this command launches the program.

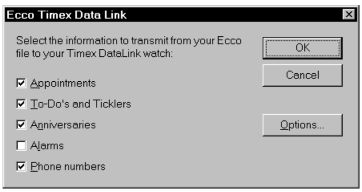
Tools: Launch Internet

Launches an Internet World Wide Browser (see README.ECO for supported browsers)

Tools: Timex Data Link

Walks you through the process of downloading your ECCO data into a Timex® Data-Link Watch. For more information, see the chapter or online help on “Importing and Exporting.

ECCO Timex Data Link dialog box

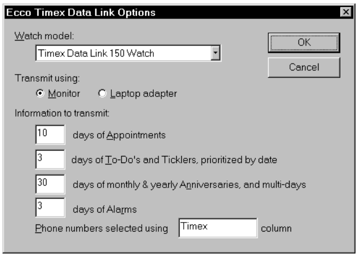


Select the types of items to be sent from your ECCO file to the Timex watch.

Tools: Timex Data-Link: Options

Displays a menu that allows you to specify the watch model and the type and amount of data to send from ECCO.

ECCO Timex Data Link Options dialog box



Watch model Select the Timex watch you will be transferring data to.

Transmit using Select the method of transfer — Monitor or Laptop adapter.

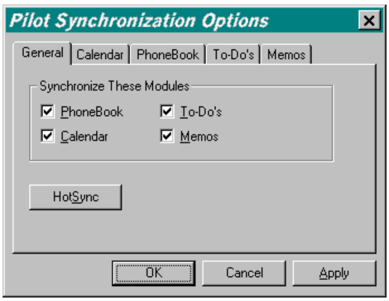
Information to transmit Select the number of days of Appointments, To-Do’s and Ticklers, Anniversaries, and Alarms to transmit.

Phone numbers selected using Enter the name of checkmark column that specifies which items are to be transmitted.

Tools: Pilot HotSync Options

Note: This feature is available only in the 32-bit version of ECCO Pro. The Pilot HotSync Options command on the Tools menu is displayed, but disabled, in the 16-bit version of ECCO Pro.

This displays the Pilot Synchronization Options dialog box.



General

Field	**Meaning**
PhoneBook	Synchronize data in ECCO's PhoneBook and Pilot's Address Book.
Calendar	Synchronize data in ECCO's Calendar and Pilot's Date Book.
To-Do's	Synchronize data in ECCO's To-Do's section and Pilot's To Do List.
Memos	Synchronize data in ECCO's Notepads and Pilot's Memo Pad.
HotSync button	Launches Pilot HotSync Manager or maximizes if minimized.

Calendar, PhoneBook, To-Do's, and Memos

Field	**Meaning**
No Subs	Do not synchronize subitems for the selected module.
Delete As Archive	Any data deleted on the Pilot should be assigned to ECCO's archive folder.
Normal Sync	Synchronize data that is new or has been modified for the selected module.
Full Sync	Synchronize all data regardless of status for the selected module.
Clear Pilot Data First	Erase the data in the selected Pilot module before resending ECCO data.

Note: The Memos tab does not have an option for No Subs.

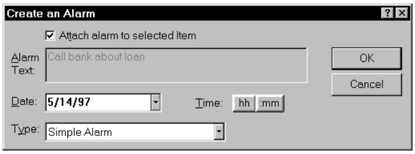
Tools: Alarms

Displays a menu with commands that let you create new alarms, review existing alarms, and edit existing alarms. Alarms are used to warn you about important events before they occur.

Tools: Alarms: Create New Alarm

Displays the Create an Alarm dialog box, in which you can create a simple alarm or a new named alarm. This command is unavailable in the Calendar, where alarms can be attached to items using the Date Settings dialog box.

Create an Alarm dialog box



Attach alarm to selected Item Attaches the alarm to the selected item and displays the item's text in the Alarm Text box.

Alarm Text Type the text you want the alarm to display when it "goes off." Typing will be disabled if the alarm is attached to a selected item.

Date Select the date on which you want the alarm to go off.

Time Select the time at which you want the alarm to go off.

Type If you select the Simple Alarm option, the alarm displays a text message at the specified time.

If you select the Custom option, the Custom Alarm dialog box (similar to the Alarms dialog box) appears. Use the Custom Alarm dialog box to set multiple alarms for this event.

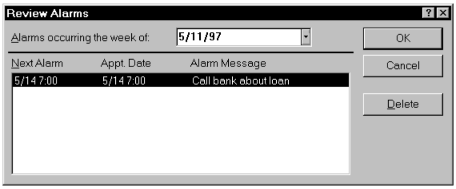
If you select the Manage option, the Manage Named Alarms dialog box appears.

If you select any named alarm, the times and options specified by the named alarm will be invoked relative to the date and time of this event.

Tools: Alarms: Review Alarms

Displays the Review Alarms dialog box, in which you can view upcoming alarms and delete those you no longer want.

Review Alarms dialog box



Alarms occurring the week of Select the week for which you want to review your alarms.

Next Alarm: Displays a list of dates for which alarms are set.

Appt. Date: Displays the dates of the events associated with the upcoming alarms.

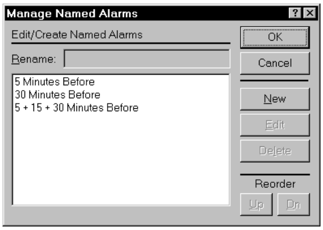
Alarm Message: Displays the events or messages associated with the upcoming alarms.

Delete button: Deletes the selected alarm.

Tools: Alarms: Manage Named Alarms

Displays the Manage Named Alarms dialog box, in which you can create or edit named alarms, delete existing named alarms, or reorder the list of named alarms.

Manage Named Alarms dialog box



Rename Type the new name you want to give the selected alarm.

New button Displays the New Named Alarm dialog box, in which you can specify options to create a new named alarm. This dialog box is similar to the Alarms dialog box.

Edit button Displays the Edit Named Alarm dialog box, in which you can modify an existing named alarm.

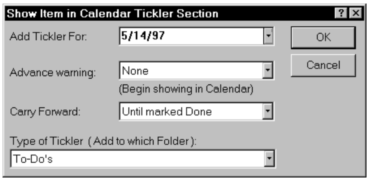
Delete button Deletes the selected named alarm.

Reorder buttons Move the selected named alarm(s) up or down on the menu one row at a time.

Tools: Ticklers

Displays the Show Item in Calendar Tickler Section dialog box, in which you can choose to display the currently selected item as a tickler item in the Tickler section of the Calendar.

Show Item in Calendar Tickler Section dialog box



Add Tickler For Specify the event date you want to associate with the tickler item.

Advance warning Specify the date you want to begin displaying the tickler item before the event date associated with the tickler item.

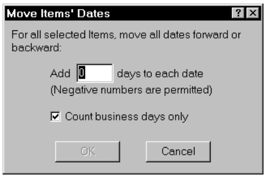
Carry Forward Specify the date you want to stop displaying the tickler item. Options range from the date associated with the tickler item to as many as two weeks after, or until you mark the item as Done.

Type of Tickler (Add to which Folder) Specify the date folder into which you want to put the tickler item. Tickler items are organized by folder in the Calendar.

Tools: Move Items' Dates

Allows you to move selected items forward or backward in terms of their dates.

Move Items' Dates dialog box



Add < > days to each date Type the number of days you want the item to be moved forwards or backwards.

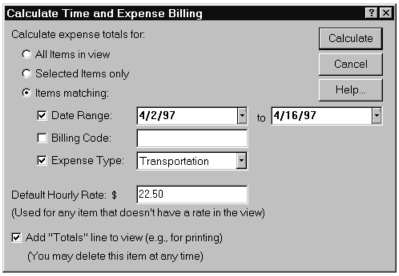
Count business days only Allows you to exclude weekends in your item movement.

Tools: Time & Expenses

Displays the Set Up Time Expense Billing dialog box, adds to the current ECCO file a Time & Expenses notepad and an Expenses form, and then displays the Calculate Time and Expense Billing dialog box. Once you have set up the notepad and form, this command displays the Calculate dialog box immediately.

You can enter expenses directly into the Time & Expenses notepad; or you can use the form to add expense items or associate expense values with any phone log, appointment, or other item.

Calculate Time and Expense Billing dialog box



Calculate expense totals for Specify whether you want to calculate a sum of the selected items only or of all items in the view.

Items matching Specify whether you want items' column values to match a date range, a billing code you enter, or an expense type that you select from the drop-down list.

Default Hourly Rate Enter a dollar amount.

Add "Totals" line to view Adds a Totals item to the Time & Expenses notepad, listing the date the total was calculated, with subitems for hourly and other expenses.

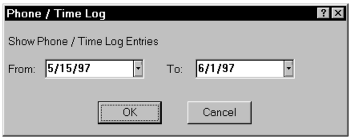
Calculate button Calculates the sum for the items you specified and displays the results in the Calculated Expenses dialog box.

Tools: Time Logger

Displays the Time Logger dialog box, in which you can log the duration of a job, task, or phone call.

Tools: Phone/Time Log

Phone / Time Log dialog box

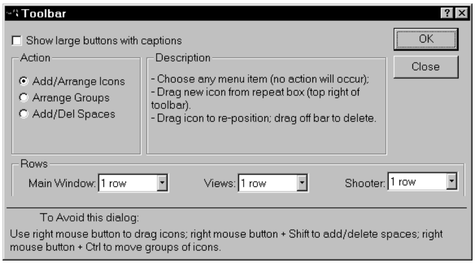


Displays the Phone/Time Log dialog box, in which you can display all your phone/time log entries between specific dates in a Notepad.

Tools: Toolbar

Displays the Toolbar dialog box, in which you customize the toolbar display. (You can also customize the toolbar by using the right mouse button to drag icons.)

Tool Bar dialog box



Show large buttons with captions When selected, the toolbar shows large icons with captions for each toolbar button. Otherwise, the toolbar shows small icons without captions.

Action Specify the icon action you want to take:

Add/Arrange Icons Allows you to add or arrange the icons.

Arrange Groups Allows you to move groups of icons as a single unit.

Add/Del Spaces Allows you to add or delete spaces between icons on the toolbar.

Description Describes the procedure for each action you want to take.

Rows Specify the number of toolbar rows you want displayed:

Main Window Specify the number of rows you want displayed in the toolbar of the ECCO program window.

Views Specify the number of rows you want displayed in the toolbar of the ECCO view windows. This setting is specific to each type of view.

Shooter Specify the number of rows you want displayed in the Shooter toolbar.

Tools: Display

Commands on this menu let you display or hide the column grid and restore any dialog box alert messages you have turned off.

Tools: Display: Column Grid

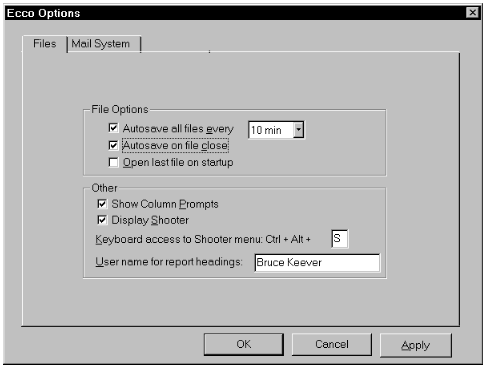
Displays or hides the column grid (vertical column lines) in the column pane of the active view only.

Tools: Display: Restore Dialog Alerts

Restores any dialog box messages you previously turned off.

Tools: Options

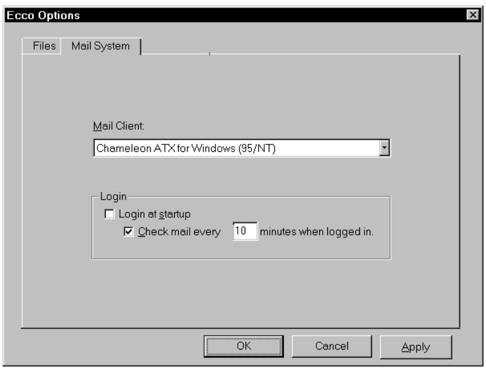
Displays the ECCO Options property sheet.



Files tab

Autosave all files every	Select a time interval from the list to save your file automatically at regular intervals.
Autosave on file close	Select this option to save your file automatically on closing. If this option is not selected, ECCO overrides this setting when you are working in a shared file. (When you are using a shared file, your changes are saved automatically in the shared file as they occur. Therefore, to ensure the highest level of data integrity and consistency, ECCO saves any file associated with a shared file automatically on closing.)
Open last file on startup	When you start ECCO, automatically opens the ECCO file last opened.
Show Column Prompts	Select this option to display column descriptions in column cells.
Display Shooter	Specifies if you want the Shooter icon to be displayed.
Keyboard access to Shooter menu: CTRL+ALT+	Specify the keyboard combination you want to use to display the Shooter menu using the keyboard.
User name for report headings:	Specify the user name you want to appear in headers when you print.
Apply button	Becomes active when changes are made to the property sheet. Changes are implemented, but the property sheet remains open.

ECCO Preferences dialog box



Mail System tab

Mail client	Displays the mail system you will use for connecting to

	the ECCO Workgroup.
Login at startup	Select to login to your mail system when starting ECCO. If unchecked, ECCO will not start your mail program until a you perform a ECCO Workgroup function such as opening a shred file or sending a group meeting request.
Check mail every	Select this option if you want ECCO to check for meeting mail or merge files (for file synchronization) at the specified time interval. If this option is not selected, you must launch the mail check manually each time you want to check for new meeting messages.
Apply Button	Becomes active when changes are made to the property sheet. Changes are implemented, but the property sheet remains open.

Column Menu

The Column menu includes commands for hiding, displaying, inserting, or deleting columns; modifying column properties; naming, aligning, moving, or sizing columns; and making the contents of a column public.

Checkmarks and values in column cells are always associated with items on the same line, just as spreadsheet cells are commonly associated with their titles. When you move an item, the values and checkmarks in columns move with the item. For more information, see the chapter on online help on “Columns and Values.”

Column: Show Columns

Shows or hides the column pane in the active view. This command is unavailable if there are no columns. To create columns, choose Insert columns.

Column: Insert Column

Inserts the column type you specify. The available column types are folder, text, number, checkmark, date, pop-up list, and Gantt.

When you insert a column, ECCO automatically creates a new folder with the name and adds it to the list in the folder window. The column can then be added to any other view as a folder column using the Insert Column: Existing Column or Folder command.

Column: Insert Column: Existing Column or Folder

Displays the Insert Folder Columns dialog box, in which you choose one or more folders (or named columns from other views) to insert as columns. When you make multiple selections from this dialog box, ECCO creates a separate column for each folder you select. You can also insert a folder column by dragging a folder from the folder window to the column pane.

Column: Insert Column: New Text

Displays the Column Heading dialog box, in which you can type a heading to display in the column. Inserts a column that allows you to type text into its cells.

Column: Insert Column: New Number

Displays the Column Heading dialog box, in which you can type a heading to display in the column. Inserts a column that allows you to type a number into its cells.

Column: Insert Column: New CheckMark

Displays the Column Heading dialog box, in which you can type a heading to display in the column. Inserts a column that allows you to enter checkmarks (or other one-character symbols) into its cells. Clicking a cell toggles the checkmark on or off. To change the checkmark symbol, use the Checkmark command on the Column menu.

Column: Insert Column: New Date

Displays the Date Column Heading dialog box, in which you can type a heading to display in the column. Inserts a column that allows you to enter dates into its cells. After you select a date column, you can enter, view, and edit dates in the cells of the column.

Use the Column Properties command to specify the date format you want to use.

Column: Insert Column: New Pop-Up List

Displays the Insert Pop-Up List Column dialog box, in which you can specify a pop-up list of values for the column. For example, the pop-up list values for a column titled “Priorities” might include the values “High,” “Medium,” and “Low.” You could click on any cell in the column and choose one of the priorities for the item on that line .

The Insert Pop-Up List Column dialog box is identical to the Pop-Up List Column Values dialog box.

Column: Insert Column: New Gantt

Displays the Create New Gantt Column dialog box, which allows you to create a Gantt chart column for the items in that view.

New Gantt Column dialog box

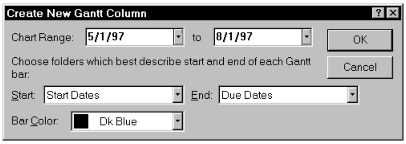


Chart Range Select the date range on which you want to base your chart.

Choose folders which best describe start and end of each Gantt bar Select the date folders on which you want to base the start and end date of the bars of your chart.

Bar Color Select a color for the bars of your chart.

Column: Remove Column

Removes the selected column.

Column: Properties

Displays the Column Properties dialog box specific to the selected column's type, in which you can specify properties for the selected column. However, you cannot change the type of an existing column.

Column Type	**Available Options**
Text	Alignment; Width; "For each Item, cell displays"; "Include this column in new notepads by default"
Number	Format; Alignment; Width; "For each Item, cell displays"; "Include this column in new notepads by default"
Checkmark	Checkmark; Alignment; Width; "For each Item, cell displays"; "Include this column in new notepads by default"
Date	Format; Alignment; Defaults; Width; "Include this column in new notepads by default"
Pop-Up List	Alignment; Values; Width; "For each Item, cell displays"; "Include this column in new notepads by default"
Gantt	Displays a dialog box identical to the Create New Gantt Column dialog box.

Alignment Specifies the alignment of the column's contents (left, right, or center).

Width Displays the Column Width dialog box.

For each Item, cell displays Specify whether the column should display the values normally associated with its type or whether it should display subfolders, making the column a multiple-folder column. Multiple-folder columns display in each cell any of those subfolders that contain the item on the same line.

Format Specifies the number format (for a Number column) or date format (for a Date column).

Checkmark Specifies the type of checkmark or symbol displayed in a checkmark column.

Defaults Displays the Date Properties dialog box.

Values Displays the Pop-Up List Column Values dialog box.

Column: Heading

Type or edit the text you want to appear as the heading of the selected column. When you change the heading of a column, ECCO automatically changes the folder with that name in the folder window.

Column: Format

Lets you specify the number format (dollar, percent, scientific notation) or date format (month/day/year order and separators) of the selected column's contents. This command is available only for Number columns and Date columns.

Column: CheckMark

Lets you specify the type of symbol you want to display in the selected checkmark column. This command is available only for Checkmark columns.

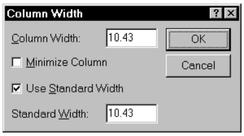
Column: Alignment

Lets you specify the alignment of the selected column's contents (left, right, or centered).

Column: Width

Displays the Column Width dialog box, in which you can specify the column width or minimize the column to a narrow width (to display a greater number of columns at one time) .

Column Width dialog box



Column Width Specify a width for your column. The width is measured in number of characters.

Minimize Column Minimizes your column to a narrow width. (You can also minimize a column by double-clicking the column header. To return a minimized column to its preminimized width, double-click the column header.)

Use Standard Width Specifies use of the standard column width.

Standard Width Specifies the column width for all columns that are using the standard width.

Column: Move Column

Lets you move a column left or right, using the keyboard. To move a column with the mouse, drag its heading to a new position in the column pane.

Column: Show Home Folder

Displays or hides the Home Folder column in the column pane, a multiple-folder column which shows the folder in which the item was first created.

Column: Make Public

Lets you make the contents of a specific column public for workgroup interaction by adding the column to a view in a shared file (and in all local files attached to the shared file). This command is valid only if you've previously connected to a shared file by choosing the Share This File command from the Network options on the File menu.

Calendar Menu

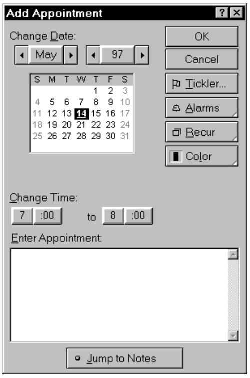
This menu is available only when the Calendar is displayed.

Commands on the Calendar menu let you add tickler items and appointments, make multi-day appointments, schedule group meetings, and navigate through the Calendar. For more information, see the chapter or online help on "The Calendar."

Calendar: Add Appt. Item

In the Appointment section, creates a new appointment item at the selected time. If the Calendar is displayed in week or month or summary views, this command displays the Add Appointment dialog box.

Add Appointment dialog box



Change Date Use the Mini-Navigator and the date grid to select a date for the appointment.

Change Time Use the buttons to set a duration for the appointment.

Enter Appointment Type a description for the appointment (its item text).

Tickler button Displays the item's Calendar Tickler Options dialog box.

Alarms button Displays the Alarms menu.

Recur button Displays the Recur menu.

Color button Select a color for the appointment's Busybar block.

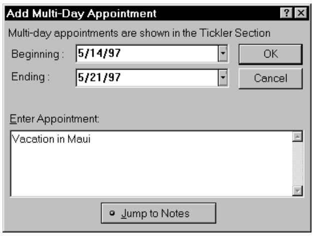
Jump to Notes button Adds an outline note for the appointment, and displays the Calendar by day. Outline notes do not appear in summary displays.

Calendar: Add Multi-Day Appt.

Displays the Add Multi-Day Appointment dialog box, in which you can specify the beginning and ending dates for a multiday appointment. Multi-day appointments are shown in the Tickler section, and they appear in the Busybar in red.

If you are working in your main Calendar file, you'll be given the option to keep time available for group meetings. If you turn off that option, you'll appear as "unavailable" in the Group Scheduling dialog box.

Add Multi-Day Appointment dialog box



Beginning Specify the first date of the multi-day appointment.

Ending Specify last date of the multi-day appointment. The default duration is one day.

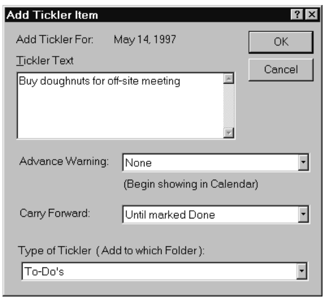
Enter Appointment Type a description for the appointment. If the Calendar is displayed in week summary, month summary, or year views, this option changes to **Enter Appointment**.

Jump to Notes button (Available only when the Calendar is displayed by week summery, month summery, or year views.) Adds an outline note for the appointment and displays the Calendar by day. Outline notes do not appear in summary views.

Calendar: Add Tickler

Displays the Add Tickler Item dialog box if the Calendar is displayed by day or in detail or the Add Tickler dialog box if the Calendar is displayed in summary. In either of these dialog boxes, you specify settings for the tickler item you are adding.

Add Tickler Item dialog box



Add Tickler For Displays the date associated with the tickler item (the date currently displayed in the Calendar).

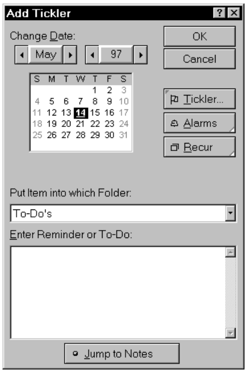
Tickler Text Enter or change the text of your tickler item.

Advance warning Specifies the date you want to begin displaying the tickler item, before the date associated with the tickler item.

Carry Forward Specify the date you want to stop displaying the tickler item. Options range from the date associated with the tickler item to as many as two weeks after, or until you mark the item as Done.

Type of Tickler (Add to which Folder) Specifies the folder into which you want to put the tickler item.

Add Tickler dialog box



Change Date Use the Mini-Navigator and the date grid to select a date for the appointment.

Put item into which Folder Specifies the folder into which you want to put the tickler item.

Enter Reminder or To-Do Type a description for the tickler item (its item text).

Tickler button Displays the item’s Calendar Tickler Options dialog box.

Alarms button Displays the Alarms menu.

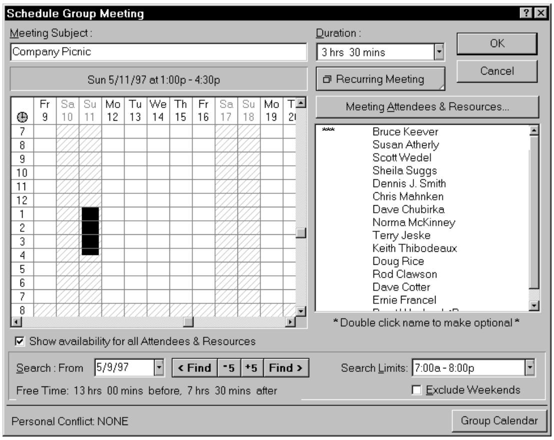
Recur button Displays the Recur menu.

Jump to Notes button Adds an outline note for the tickler item and displays the Calendar by day. Outline notes do not appear in summary displays.

Calendar: Add Group Meeting

Displays the Schedule Group Meeting dialog box, in which you can schedule group meetings.

Schedule Group Meeting dialog box



Meeting Subject Type here the subject of the meeting.

Duration Specify the length of the meeting.

Recurring Meeting Specify if there will be recurrences of this meeting.

Attendees & Resources Choose this button to display the Choose Users, Groups, and Resources dialog box, in which you can specify who you want to attend the meeting.

Search Specify the starting date and workday time limits, including or excluding weekends, in which you want to find an available time.

Find buttons Find available time by searching forward (>) or backward (<).

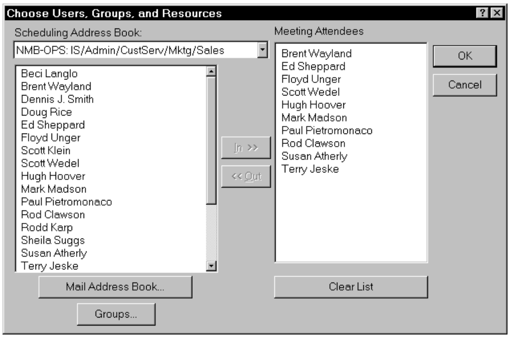
+5/-5 buttons Click repeatedly to change meeting start time by increments of five minutes.

Group Calendar button Displays the Group Calendar for the selected workgroup users.

The following dialog box appears when you choose the Attendees & Resources button in the Schedule Group Meeting dialog box.

This dialog box is also displayed in other situations where you need to supply the name of an ECCO user or a mail address. This dialog box lets you specify the users, groups, or mail addresses desired.

Choose Users, Groups, and Resources dialog box



Scheduling Address Book Displays a list of all names in your Scheduling Address Book. Choose the down arrow list box control to view other connected ECCO Workgroup Directories and their users.

Mail Address Book Choose this button to select meeting attendees from your mail program's address book.

In button Adds the selected name in the Scheduling Address Book list to the Meeting Attendees list.

Out button Deletes the selected name from the Meeting Attendees list.

Meeting Attendees Displays the list of meeting attendees you have selected.

Clear List Choose this button to clear all names from the Meeting Attendees list.

Groups Choose this button to display the Edit Groups dialog box, in which you can edit or create new scheduling groups. When you create a scheduling group, you assign a set of people or resources to a single name. When you add that group name to the Meeting Attendee list, each individual receives a request to attend the meeting. When you create a group, the group is made available to everyone.

Calendar: Time, Date, Alarm, etc.

Displays the Date Settings dialog box for the selected item. This command is available only if the selected item is an appointment or tickler item and the Calendar is displayed by day or in week or month detail view.

For multi-day appointments, this command displays the Edit Multi-Day Appointment dialog box, which is similar to the Add Multi-Day Appointment dialog box.

Calendar: Add Outline Note

Adds to the selected item a subitem, which you can use to record notes. This command is available only when an item is selected and the Calendar is displayed by day or in week or month detail views.

Calendar: See All Recurring Notes

Shows outline notes for the selected instance of a recurring event or for all instances of the event. This command is available only when the Calendar is displayed by day or in week or month detail views and only when a recurring appointment is selected. This option effects only the selected appointment and is remembered for that recurring appointment whenever it appears in the Calendar.

Calendar: Navigate

Moves the Calendar display to the previous or next day, month, or year, or to any date you specify.

Calendar: Sidebar Shows

Changes the display of the sidebar (the left-most area of the Calendar window, under the Day/Week/Month/Year buttons) to show a Busybar for the selected day, week, or month, or show "thumbnail" calendars for the selected, previous, and next month, or hides the sidebar.

Calendar: Show Group Calendar

Allows you to see other workgroup users' appointments. Displays the Choose Users, Groups, and Resources dialog box, in which you select the users whose appointments you want to view. Then displays the Group Calendar for the selected users, by week or month in summary views, and opens the Group Calendar Options dialog box.

Group Calendar Options dialog box

Users button Displays the Choose Users, Groups, and Resources dialog box, in which you can select the users whose calendars you want to view.

Make Meeting button Displays the Schedule Group Meeting dialog box.

Initials button Specify whether you want to see initials or full names for workgroup users.

Done button Closes the Group Calendar Options dialog box.

Calendar: Show Tickler Section on Top

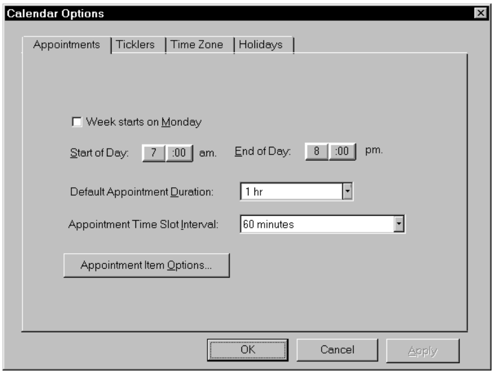
When checked, displays the Tickler section above the Appointment section, rather than to the right of it. This command is available only when the Calendar is displayed by day or week or month detail view.

ECCO is sensitive to state of your computer screen, so this command may be unavailable if the ECCO program window is crowded or if your monitor display is at a low resolution.

Calendar: Use with PhoneBook

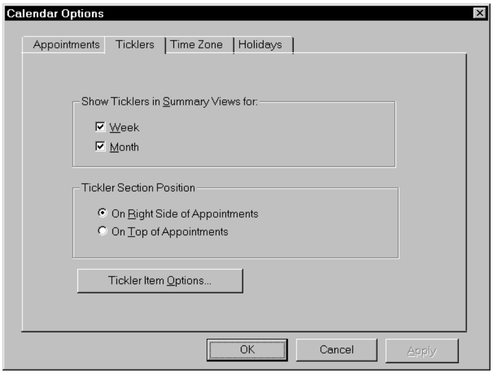
Opens the PhoneBook and arranges the windows side by side so that both the PhoneBook and the Calendar are visible. You can drag any name in the PhoneBook to the Calendar to automatically create an appointment.

Calendar: Options



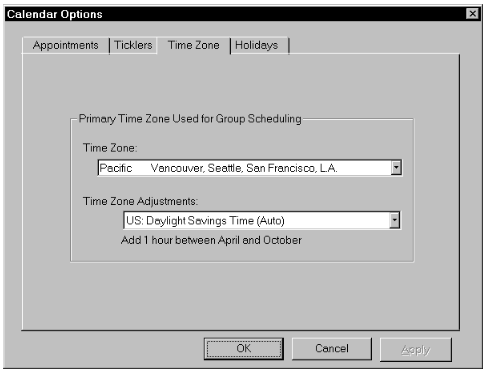
Appointments tab

Week starts on Monday	Specify whether your calendar week should begin on Monday, rather than Sunday.
Start of Day	Specify the time your workday begins.
End of Day	Specify the time your workday end.
Default Appointment Duration	Specify the default appointment length.
Appointment Time Slot Interval	Select a default appointment time increment to be displayed in the Day view.
Appointment Item Options button	Displays the Date Properties dialog box, in which you can select default settings for all new appointments.
Apply button	Becomes active when changes are made to the property sheet. Changes are implemented, but the property sheet remains open.



Ticklers tab

Show Ticklers in Summary Views for Week	Select this option to display tickler items when the Calendar is displayed by the week view.
Show Ticklers in Summary Views for Month	Select this option to display tickler items when the Calendar is displayed by the month view.
Tickler Item Options button	Displays the Choose Tickler Type dialog box, in which you select a default type or folder for new tickler items.
Apply button	Becomes active when changes are made to the property sheet. Changes are implemented, but the property sheet remains open.



Time Zone tab

Time Zone	Select your location's time zone (used for group scheduling). For example, if someone in New York schedules a 3:00 p.m. phone conference and your primary time zone is Pacific time, the meeting would appear at 12:00 p.m. on your Calendar.

Time Zone Adjustment	Specify any local differences from international standard time zones (15 to 45 minutes), or select U.S. daylight savings time, which adjusts one hour between April and October.
Apply button	Becomes active when changes are made to the property sheet. Changes are implemented, but the property sheet remains open.

Holidays tab

Show Holidays for	Specify the country whose national holidays you want displayed in the Calendars.
Custom Holiday button	Displays the Manage Custom Holidays dialog box, in which you can add, delete, or rename custom holidays (such as birthdays), or delete standard holidays.
Apply button	Becomes active when changes are made to the property sheet. Changes are implemented, but the property sheet remains open.

PhoneBook Menu

The PhoneBook menu is located on the main menu and is available only in the PhoneBook.

Commands on the PhoneBook menu let you create, edit, delete, and add notes to PhoneBook items; search your PhoneBook; and autodial numbers. For more information, see chapter or online help on “The PhoneBook.”

PhoneBook: New Name

Displays the New PhoneBook Name dialog box, in which you enter information for a new PhoneBook item and add it to the PhoneBook.

PhoneBook: Delete Name

Deletes the selected PhoneBook item. If the selected item appears in other views, the Delete Items dialog box appears. You are asked whether you want to make the deletion from the PhoneBook or from all views.

PhoneBook: Add Outline Note

Adds to the selected item a subitem, which you can use to record notes.

PhoneBook: Show All Names

Displays all items in your PhoneBook. If a filter is on, all items meeting filter criteria will be displayed.

PhoneBook: Search Options

Displays the Search Options dialog box, in which you specify whether you want to include first names, outline notes, company, or any other fields when you search for PhoneBook text. By default, ECCO will always search last names.

PhoneBook: Address Printing

Displays the Address Printing Defaults dialog box, in which you specify whether to use home addresses when printing the current PhoneBook name. You can also set home address as the default when printing any new PhoneBook names.

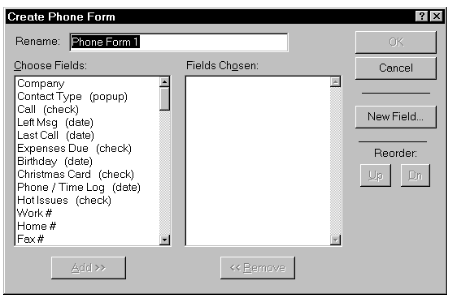
PhoneBook: Change PhoneBook Form

Allows you to create or manage customized PhoneBook forms, containing fields for any folders you specify.

PhoneBook: Change PhoneBook Form: New

Opens the Create Phone Form dialog box, in which you select existing fields (folders) for your new PhoneBook form or choose the New Field button to create a new field and specify the order of the fields in the new form.

Create Phone Form dialog box



Rename Type here the new name you want to give the selected PhoneBook form.

Choose Fields Select a folder name to include as a field in the new PhoneBook form.

Fields Chosen Displays the fields that will be included in the PhoneBook form.

Add button Adds the selected field in the Choose Fields list to the Fields Chosen list.

Remove button Removes the selected field from the Fields Chosen list.

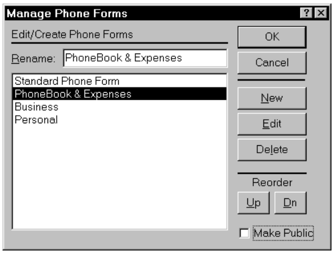
New Field button Displays the New Field & Column dialog box, in which you can create a new column or folder to add to your form.

Reorder buttons Move the selected PhoneBook field(s) up or down one row at a time in the PhoneBook form.

PhoneBook: Change PhoneBook Form: Manage

Opens the Manage Phone Forms dialog box, in which you can create, rename, or edit PhoneBook forms or reorder them on the Change PhoneBook Form menu.

Manage Phone Forms dialog box



Rename Type the new name you want to give the selected PhoneBook form.

Delete button Deletes the selected PhoneBook form.

Reorder buttons Move the selected PhoneBook form(s) up or down one row at a time on the Change PhoneBook Form menu.

Make Public Makes the selected PhoneBook form public. When a form is shared, it is available to other users. This option is valid only if you've previously made the ECCO file available by choosing the Share This File subcommand from the Network command on the File menu.

PhoneBook: Hide Form

When checked, hides the PhoneBook form.

PhoneBook: Show Form At Right

When checked, displays the PhoneBook form to the right of the PhoneBook list rather than below it.

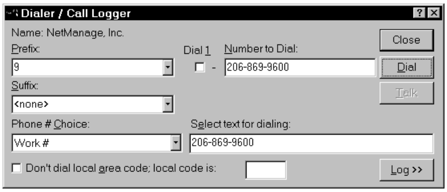
PhoneBook: Show Full Columns

When checked, displays the PhoneBook form below the PhoneBook list rather than to the right of it.

PhoneBook: Dial phone

Displays the Dialer/Call Logger dialog box, in which you can dial or log a phone call.

Dialer/Call Logger dialog box



Name Displays the selected name from the PhoneBook list.

Prefix Specifies a dialing prefix and maintains a history of previously used prefixes.

Dial 1 Dials 1 for a long-distance number. ECCO automatically turns this option off when you dial local calls.

Number to Dial Displays the phone number to be dialed. When you open the dialog box, ECCO displays the work number corresponding to the selected item. You can select a different number from the Phone # Choice list.

Suffix Dials additional numbers after the phone number (for use with calling cards, etc.).

Phone # Choice Displays the phone number categories for the selected item (for example, home #, work #, and fax #). If you add a new phone number column, it appears in this list.

Select text for dialing Select the text you want ECCO to dial (for example, the phone number but not an extension number).

Don’t dial local area code; local code is Type your local area code if you want ECCO to omit the local area code when dialing local phone numbers.

Dial button Dials the number displayed in the Number to Dial box. The name of this button changes to Hangup while your call is in progress.

Talk button Releases control of the phone line from the modem so that you can begin your conversation.

Setup button Displays the Phone Dialer Setup dialog box, in which you can specify your modem's prefix, suffix, and port connection.

Call Logging Specify options for logging your call:

> **Begin Logging upon dialing or Start/Stop Logging here** Starts logging as soon as you choose Dial.
>
> **Begin Logging button** Manually begins logging, and brings up the Elapsed Time dialog box.
>
> **Close button** Closes the Dialer/Call Logger dialog box.

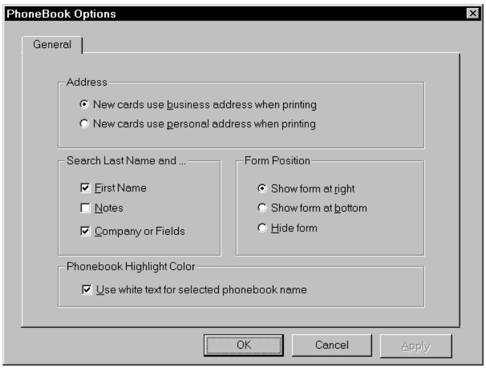
PhoneBook: Correspondence Manager

Displays the Correspondence Manager dialog box, in which you can create and send your correspondence.

PhoneBook: Use with Calendar

Displays a combined PhoneBook and Calendar. You can drag any name in the PhoneBook to the Calendar to automatically create an appointment.

PhoneBook: Options



General tab

New cards use business address when printing	Specifies to use the business address when printing.
New cards use home address when printing	Specifies to use the business address when printing.
Search Last Name and First Name	Searches look at the last and first name.
Search Last Name and	Searches look at the last name and notes field.

Notes	
Search Last Name	Searches look at the last name only.
Search Last Name and Company or Fields	Searches look at the last name, company, or fields.
Show form at right	When checked, displays the PhoneBook form to the right of the PhoneBook list rather than below it.
Show form at bottom	When checked, displays the PhoneBook form to the bottom of the PhoneBook list rather than to the right of it.
Hide form	When checked, hides the PhoneBook form.
Use white text for selected PhoneBook name	Select this option to change the text color from black to white on the selected PhoneBook name.
Apply button	Becomes active when changes are made to the property sheet. Changes are implemented, but the property sheet remains open.

Help Menu

The Help menu includes commands to view the online *User's Guide* and view specific Help topics, do a keyword search of the online *User's Guide*, or choose a command for which you want to view a Help topic.

Help: Contents

Displays a list of Help topics.

Help: Search

Displays the Search dialog box.

Help: Menu Help

Displays a "choose menu" cursor, with which you can choose the menu or command for which you want to see a Help topic.

Help: Shortcut Keys

Displays a list of keyboard shortcuts.

Help: Help on this View

Displays a Help topic on how to use the active view.

Help: Help on ECCO Folders

Displays a Help topic on how to use folders.

Help: Show Dynamic Help

Displays or hides status bar help messages that change dynamically as you move the mouse.

Help: About ECCO

Displays information about your version of ECCO.

Non-Menu Bar Commands

The commands in this section appear on menus that are not on the menu bar. The following menus are included in this section:

- The Folder menu (in the folder window)
- The folder options pop-up menu (appears when you click folder names in the folder window)
- The Shooter menu (appears when you click the Shooter icon in any program)

Folder Menu

The Folder menu appears in the upper-right corner of the folder window.

Commands on this menu let you edit folders; add items to folders; create new folders; assign values to folders; change default properties; delete folders; assign folders using the keyboard; and make folders public.

Folders are the basic organizational container for your information and are used for organizing, collecting, and cross-referencing items. Every item goes into a folder, but an item can exist in many folders at one time. You can view folders in the folder window, view the contents of any folder in a Notepad, and you can insert and view folders as folder columns in the column pane of any view. For more information, see the chapter or online help on “Folders.”

Folder: Assign Folders

After you choose this command, clicking a folder name opens the folder options pop-up menu.

Folder: Edit Folders

After you choose this command, you can use the folder window to rename folders, reorganize the folder outline, add new folders, view a folder type, change default properties, delete folders, or make folders public.

Folder: Find Folder

Displays a Find dialog box, in which you specify all or part of the name of the folder you want to find in the folder window.

Folder: New Folder

Inserts a new folder after the selected folder in the folder window. Alternatively, you can insert a new folder by pressing the ENTER key.

Folder: Folder Type

Lets you view or change the type of the selected folder. If a folder currently contains items, you cannot change the folder's type. Also, you can't change the type of any default folder, such as PhoneBook or Appointments. Folder types allow you to associate a checkmark, text, numbers, or dates with items when you add the items to folders. This command is available only when you have previously chosen the Edit Folders command.

Folder Type: Text

Makes the selected folder a text folder, which allows you to associate additional text with each item you add to the folder.

Folder Type: Number

Makes the selected folder a number folder, which allows you to associate a number with each item you add to the folder.

Folder Type: CheckMark

Makes the selected folder a checkmark folder, which allows you to associate a checkmark with each item you add to the folder (rather than associating a number, text, or a date). Checkmark is the default folder type.

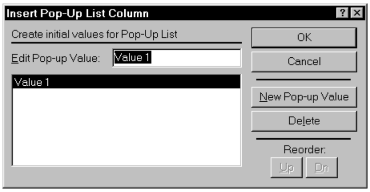
Folder Type: Date

Makes the selected folder a date folder, which allows you to associate a date and time with each item you add to the folder. Items added to a date folder automatically appear in the Calendar on the appropriate date and time.

Folder Type: Pop-Up List

Displays the Pop-Up List Column Values dialog box, in which you can specify a pop-up list of values. When you add an item to a pop-up list folder, you can associate one of the values in the pop-up list with the item.

Pop-Up List Column Values dialog box



Edit box Type here to edit the text of a pop-up list value.

Pop-up Value button Creates a new value. Displays “Value 1” in the Edit box. Type in the Edit box to specify new value text.

Delete button Deletes the selected value.

Reorder buttons Move the selected value up or down one line at a time.

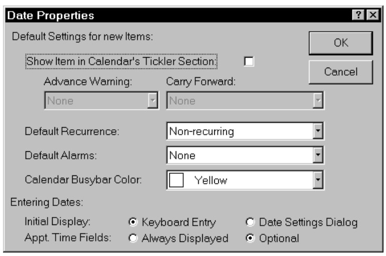
Folder: Properties

This command is available only for number folders, date folders, and pop-up list folders.

If a number folder is selected, this command displays the Number Properties dialog box, in which you can select a number format.

If a date folder is selected, this command displays the Date Properties dialog box, in which you can specify properties for the selected date folder. If you often set alarms, or if you like to display tickler items a particular number of days before an appointment, you can change the default settings to the settings you use most often.

Date Properties dialog box



Default Settings for new Items: Specifies Tickler, recurrence, alarm, and Busybar settings for new appointments or any items you add to date folders.

> **Show Item in Calendar’s Tickler Section** If checked, new items added to the folder are displayed in the Calendar’s Tickler section by default.
>
> **Beginning** Specify the number of days or weeks before a tickler item’s date that you want to begin displaying it in the Tickler section. This gives you advance warning for an event on a specific date.

Ending Specify the number of days or weeks after the tickler item's date that you want to stop displaying it in the Tickler section. Alternatively, you can choose to display the item in the Tickler section until it is marked Done.

Default Recurrence Specify a recurrence option.

Default Alarms Specify an alarm.

Calendar Busybar Color Specify a color for the appointment's busybar in the Calendar.

Entering Dates Specify options for displaying a value edit box or the Date Settings dialog box when you enter dates.

Initial Display Specify keyboard or Date Settings dialog box options for entering dates.

Keyboard Entry When you edit a date value, displays a value edit box in which you can enter a date.

Date Settings Dialog When you edit a date value, displays the Date Settings dialog box, in which you can select dates or use other date settings options.

Appt. Time Fields Specify display options for the Appointment Time fields.

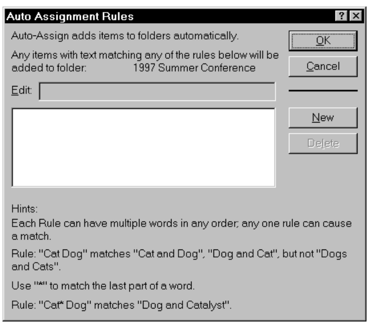
Always Displayed Always displays the appointment time fields at the bottom of the Date Settings dialog box.

Optional Displays the appointment time fields at the bottom of the Date Settings dialog box only when you're setting an appointment.

Folder: Auto Assign Rules

Displays the Auto Assignment Rules dialog box, in which you can automatically add all items containing text you specify (the assignment rule) to the folder selected in the folder window.

Auto Assignment Rules dialog box



Edit Type here the text (the assignment rule) of the items you want to add automatically to the folder selected in the folder window.

New button Adds a new rule (Rule 1) to the Edit text box. Type over this text to add a new rule.

Delete button Deletes the selected rule.

Folder: Delete Folder

Removes the selected folders and their subfolders from all views and the folder window, without copying them onto the Clipboard. Removes items from the folders without removing items from the file.

Because any item can appear in many folders, deleting a folder does not delete the items it contains. You can delete items in any folder by displaying the folder in a view and deleting items from the view. You can also search for any items and collect them in the Search Results folder using the Find command.

You can’t remove any of the default folders, such as PhoneBook and Appointments.

This command is available only when you have previously chosen the Edit Folders command.

Folder: Assign/Search by Keys

Allows you to use the keyboard in the folder window. When you choose this command, the folder most recently selected in the folder window changes to black. Type any letter to find the next folder whose name begins with that letter; type it again to find the next, and so on. You can move the highlight with the up and down arrow keys. Press the left arrow key to hide subfolders, press the right arrow key to expand subfolders, and press the SPACEBAR or the ENTER key to display the folder options pop-up menu.

Folder: Add Folders to View

Adds the folders you have selected to the bottom of the active Notepad. The items in these folders will be displayed in the view. Alternatively, you can add folders to a Notepad by dragging them from the folder window into the view.

Folder: Show Folder Column

Inserts a folder column that shows a checkmark (for checkmark folders) or a column value (for folders that have a type other than checkmark) for each item that is in the selected folder. The checkmark or value appears in the column, on the same line as the item.

Alternatively, you can add folder columns to a view by dragging folders from the folder window into the column pane of any active view.

Folder: Make Public

Makes the selected folder public for use by others over a network.

This command is valid only if you've previously connected to a shared file by choosing the Share This File command from the Network options on the File menu.

Folder Options Pop-up Menu

This menu pops up when you have chosen the Assign Folders command from the Folders menu, and then either

- Click a folder button, to the far left of a folder name; or
- Choose a folder name and press the ENTER key.

The folder options pop-up menu

Commands on this menu let you add items to folders, remove items from folders, and show the folder's items in the active Notepad.

Folder Options: Add Selected Items to Folder(s)

Adds the selected items in the active view to the selected folder(s) in the folder window. To add items to multiple adjacent folders, drag the mouse pointer through the folder buttons for the desired folders. If you select multiple folders that have values (folders of any type other than checkmark), the Specify Folders and Column Values dialog box appears, in which you can associate a value with the items in each folder.

Folder Options: Remove Items from Folder(s)

Removes the selected items and their associated values from the folder or column.

Folder Options: View Folder's Items

Displays the folder and its items in a scratch Notepad, replacing any folders previously in the scratch view.

Shooter Menu

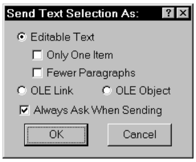
Using Shooter menu commands, you can send, or "shoot," selected information from other programs to ECCO views or folders, from ECCO views to other programs, or between other programs. Click the Shooter icon to display its menu.

The Shooter menu

Depending upon the preference you have selected, ECCO might display the Send Text Selection As dialog box or the Send Graphics Selection As dialog box before sending your information. The only difference between these dialog boxes is that the Send Graphics Selection As dialog box does not have an Editable Text option.

When the information has been sent, a small Item Sent message window appears briefly next to your Shooter icon. For more information, see the chapter or online help on “Using ECCO with Other Programs.”

Send Text Selection As dialog box



Editable Text Sends your selection to ECCO as editable text. In addition, many applications add special hidden characters to the text you see on the screen. For example, word processors and telecommunications applications typically add hidden control characters (carriage returns) at the end of each line of text. When you select and shoot this kind of editable text, Shooter sends the text and includes all the carriage returns embedded within the text. Unless you select one of the following options, Shooter sends each line as a separate item. ECCO creates multiple outline items for every line ending with a carriage return.

Only One Item Sends your selection as one item. Each line in your selection is a separate paragraph within that item.

Fewer Paragraphs Sends your selection as one item. All lines in your selection become a single paragraph in that item.

OLE Link Sends your selection to ECCO as linked text or graphics.

OLE Object Sends your selection to ECCO as an embedded object.

Always Ask When Sending Displays the Send Text Selection As dialog box every time before sending. Canceling this option prevents the dialog box from appearing when you send selections in the future. To reinstate the dialog box, choose Preferences from the Shooter menu, choose either Send Text As or Send Graphics As, and then choose Ask Before Sending.

Shooter: Active View

Sends the selection to the active view or to the most recent ECCO view.

Shooter: Calendar

Sends the selection to the Calendar. After you choose OK in the Send Text Selection As dialog box, an appointment edit box appears, in which you can set date and time options before sending the selection by clicking the ENT button or pressing the ENTER key. If no time is specified, the selection is sent to the Tickler section of the Calendar. If a time is specified, the selection is sent to the Appointment section.

Shooter: Folders

Displays the Shooter toolbar and the folder window (which contains a list of all the folders in your ECCO file). Choose the folders to which you want to send the selection. To close the window, double-click the Shooter icon or, from the Shooter menu, choose the Close Folders command.

Shooter: Relative to Last

Sends the selection to the same level as the last selection you sent, one level to the right of the last selection (as a subitem), or one level to the left of the last selection.

Shooter: <Other Program>

Displays a list of active files of the other Windows programs that are currently running, from which you can choose where to send your selection. If you choose this command while ECCO is active, the command inserts the text into and switches you to the program you choose.

Shooter: Show

Specify the display of the Shooter and its icon, the Shooter toolbar and the folder window. If you hide the Shooter, you can display it again by switching to ECCO and choosing the Show Shooter command from the Tools menu.

Shooter: Preferences

Changes the default Shooter settings.

Preferences: Choose ECCO File

Selects the ECCO file to which you want to send information. Choosing the Open Another command displays the File Open dialog box, from which you can select other ECCO files. All open ECCO files are listed at the bottom of this menu.

Preferences: Send Text As

Changes the default settings for sending text as editable text, OLE linked text, or an OLE embedded object, and changes the default setting to display or hide the Send Text Selection As dialog box before sending text.

Preferences: Send Graphics As

Changes the default settings for sending graphics as OLE linked objects or OLE embedded objects and changes the default setting to display or hide the Send Graphics Selection As dialog box before sending text.

Shooter: Add By Form

Displays a list of existing forms that you can apply to the current selection.

Shooter: Get Address

Displays the Get Address dialog box, in which you can get an address from your PhoneBook.

Get Address dialog box

The dialog box contains the following fields:

Search Text box	Displays any text you have selected. You can also type in any name in your PhoneBook for which you want to get an address.
Search button	Searches for the text you specified in the PhoneBook of the active ECCO file.
PhoneBook Names	Lists the PhoneBook names that matched the search text you specified.
Phone	Specify whether you want to include work and fax phone numbers, or all fields, in the address you get.
Address	Specify whether you want to get the home or business address.
OK button	Choose to copy the address into the active document in the active program

Shooter: Go To ECCO

Switches you to the active view in ECCO.

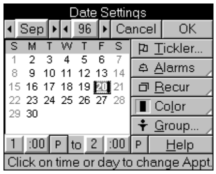
Shooter: ECCO Shooter Help

Opens online Help for the Shooter. For more information, see the chapter or online help on “Using ECCO with Other Programs.”

Date Settings Commands

The Date Settings commands appear on menus that are available from the buttons in the Date Settings dialog box. For more information, see the chapter or online help on “The Calendar.”

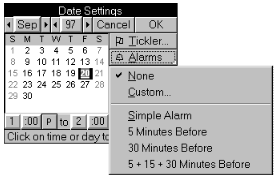
The Date Settings dialog box



Alarms Menu

Commands on this menu let you create a custom alarm. You use alarms to get advance warning for important events. For more information, see the chapter or online help on "The Calendar."

The Alarms menu

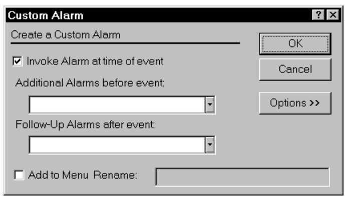


Alarms: None

Removes the alarm from the selected item.

Alarms: Custom

Displays the Alarms dialog box, in which you can specify parameters for a new alarm for the selected item.



The dialog box contains the following fields:

Invoke Alarm at time of appointment	Specifies whether the alarm will go off at the time of the selected appointment.
Additional Alarms before appointment	Sets additional alarms to occur minutes, hours, days, weeks, or any combination of time increments before the specified date. Selecting multiple options will cause

	alarms to go off multiple times before the event.
Follow-Up Alarms after appointment	Sets additional alarms to occur minutes, hours, days, weeks, or any combination of time increments after the specified date.
Add to Menu	Adds the named alarm to the Alarms menu so that these same settings can be used for other appointments or to-do's.
Rename	Renames the alarm for the menu display.
Options button	Expands the dialog box to display the following additional options:
Dialog Message	Specifies that you want to display a dialog box message; type the text of the message in the adjacent box. By default, an alarm displays a dialog box with the item's text.
Play Sound	Specifies a sound file you want to play at the alarm time. Choose the Browse button to select a file.
Launch Document/.BAT File	Specifies a document or a .BAT file you want to launch at the alarm time. Choose the Browse button to select a file.
Confirm Before Launch	Displays a dialog box asking

you to confirm that you want to launch the specified document or .BAT file.

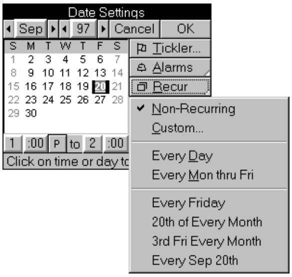
Alarms: <Named Alarms>

Displays the list of named alarms. The default named alarm is Simple Alarm.

Recur Menu

The Recur button in the Date Settings dialog box displays the Recur menu. From this menu, you can create a custom recurring event or a standard recurring event, or you can change an existing recurring event into a non-recurring event. For more information, see the chapter or online help on “The Calendar.”

The Recur menu



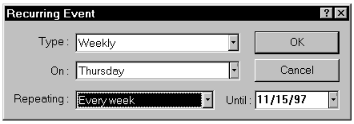
Recur: Non-Recurring

Removes the recurring event attributes from an item.

Recur: Custom

Displays the Recurring Event dialog box, in which you can create a custom recurring event.

Recurring Event dialog box



The dialog box contains the following fields:

Type	Specify the kind of recurrence you want for the recurring event. The options are: daily, weekly, monthly by date, monthly by weekday, monthly by business day, and yearly.
On	Specify the dates on which you want to recurring event to take place, such as the 16th of each month. You can choose as many of these options as you want.
Repeating	Specify the frequency of recurrence. For example, if you choose the Monthly By Date option, you can specify recurrence ranging from every month to every 20 months, or specific selected months to be repeated every year.
Until	Specify the date you want to end the recurring event.

Recur: Every Day

Sets the event to recur daily.

Recur: Every Mon thru Fri

Sets the event to recur every weekday.

Recur: <Date-Specific Options>

Sets the event to recur at a weekly, monthly, or yearly interval based on the selected item's date.

Group Menu

Using the commands on this menu, you can schedule group meetings, as well as keep time available in your Calendar for other meetings or appointments.

Group: Make Group Meeting

Displays the Change Appointment to Group Meeting dialog box, in which you can set up a meeting, invite meeting attendees, schedule meeting resources, and so forth. This dialog box is identical to the Schedule Group Meeting dialog box.

Group: Keep Time Available

Schedules the meeting in your Calendar without blocking out time in the group availability database. In this case, ECCO does not display a possible schedule conflict error message if another user schedules a group meeting with you at that time. This command is useful if you want to be aware of an event but don't plan to attend.

Appendix A: Keyboard and Mouse Shortcuts

File Menu

To choose	Press
New (file not based on a template)	ALT+F+N
Open	CTRL+O
Save	CTRL+S
Print	CTRL+P
Exit	ALT+X

Edit Menu

To choose	Press/Click
Undo	CTRL+Z or ALT+BACKSPACE
Cut	CTRL+X or SHIFT+DELETE or click right mouse button and choose command from pop-up menu
Copy	CTRL+C or CTRL+INSERT or click right mouse button and choose command from pop-up menu
Paste	CTRL+V or SHIFT+INSERT or click right mouse button and choose command from pop-up menu
Delete Items	CTRL+D or click right mouse button and choose command from pop-up menu; or if whole item is selected, press DELETE or BACKSPACE

To choose	**Press/Click**
Find	CTRL+F
Find Next	CTRL+N
Insert Date Stamp	CTRL+Q
Insert New Line (in item)	SHIFT+ENTER
Insert Tab (in item)	CTRL+T

Working with Windows

To	**Press/Click**
View the Calendar	ALT+1
View the PhoneBook	ALT+2
View Notepads (first through seventh created)	ALT+3 through ALT+9
View meeting mail	ALT+B
Get Help on the active view	F1
Copy item(s) between views in the same window	Click item(s) and drag between views
Move clockwise between views in active window	CTRL+TAB
Move counter-clockwise between views in active window	CTRL+SHIFT+TAB
Open column pane, or switch to or from column pane	F11
Notepads: splits the active window, or switches between top and bottom panes of the window. Calendar: switches between the Appointment section and the Tickler section. PhoneBook: switches between the PhoneBook list and the PhoneBook entry form.	F12

Moving the Cursor

You can extend your selection by holding down the SHIFT key with any of the following key combinations.

To move	Press
One character left	LEFT ARROW
One character right	RIGHT ARROW
One word left	CTRL+LEFT ARROW
One word right	CTRL+RIGHT ARROW
To end of line	END
To beginning of line	HOME
To previous item at same level	CTRL+UP ARROW
To next item at same level	CTRL+DOWN ARROW
To previous item at level to left	CTRL+PAGE UP
To next item at level to left	CTRL+PAGE DOWN
To beginning of view	CTRL+HOME
To end of view	CTRL+END
One screen down	PAGE DOWN
One screen up	PAGE UP
Clockwise between views in active window	CTRL+TAB
Counter-clockwise between views in active window	CTRL+SHIFT+TAB

Outlining

To	Press/Click
Add item at same level as selected item	CTRL+ENTER

To	Press/Click
Add item right (indented subitem one level below selected item)	CTRL+R or click right mouse button and choose Add Item Right or Add Outline Note from pop-up menu; or, if no subitems exist, double-click item bullet
Add item left (one level above selected item)	CTRL+L
Show item's folder values	Click right mouse button and choose Show Item Info from pop-up menu
Show subitems (levels 1 through 9) in view	CTRL+1 through CTRL+9
Show subitems (levels 1 through 9) of selected items	SHIFT+CTRL+1 through 9
Display the Show Levels dialog box	CTRL+W
Hide (collapse) subitems of selected items	CTRL+H or, double-click item bullet
Expand (show) next level of subitems of selected items	CTRL+E or double-click item bullet
Delete single subitem containing no text	Double-click item bullet of parent item
Expand (show) all subitems of selected items	CTRL+G or ALT+double-click item bullet
Select sequential items	SHIFT+UP ARROW or SHIFT+DOWN ARROW
Select nonsequential items	CTRL+click item bullets
Move item(s) right	TAB or ALT+RIGHT ARROW
Move item(s) left	SHIFT+TAB or ALT+LEFT ARROW
Move item(s) up	ALT+UP ARROW

To	Press/Click
Move item(s) down	ALT+DOWN ARROW
Mark item(s) as done	CTRL+M or click right mouse button and choose command from pop-up menu
Make item(s) private	Click right mouse button and choose command from pop-up menu
Sort items by column value	Click right mouse button in Column pane and choose Sort, Sort Up, or Sort Down from pop-up menu
Insert new line (line break) in text in a cell of a text column	CTRL+ENTER
Delete one character of item text to right of cursor	DELETE
Delete item text to beginning of word	CTRL+BACKSPACE
Display Shooter menu in another program	CTRL+ALT+S or CTRL+ALT+any other letter you specify in the ECCO Preferences dialog box
Dial phone	CTRL+F3 or click right mouse button and choose command from pop-up menu

Formatting

To	Press/Click
Display the Character dialog box	CTRL+K or click right mouse button and choose command from pop-up menu
Apply bold formatting	CTRL+B
Apply italic formatting	CTRL+I
Apply underline formatting	CTRL+U
Remove character formatting	CTRL+SPACEBAR

To	Press/Click
Display the Outline Styles dialog box	CTRL+Y
Apply a Format menu command or toolbar button to the outline style of selected levels	CTRL while choosing the command or toolbar button

The Calendar

To	Press/Click
Add tickler item below selected tickler item	ENTER
Add item right (outline note as subitem)	CTRL+R or select appointment and press ENTER
Open an appointment edit box for selected tickler item or appointment	F2
Go to today	ALT+G
Go to date—specify date or number of week	F4
Go to next day	F10
Go to previous day	F9
Go to next month	F8
Go to previous month	F7
Go to next year	F6
Go to previous year	F5
Display the Calendar by day	ALT+D
Display the Calendar by week	ALT+K
Display the Calendar by month	ALT+M
Display the Calendar by year	ALT+Y

To	**Press/Click**
Switch between summary and detail displays of week or month	SHIFT+F10
Switch between Tickler section and Appointment section	F12
Dial phone	CTRL+F3 or click right mouse button and choose command from pop-up menu

The PhoneBook

To	**Press/Click**
Add a new PhoneBook name (item)	F3 or ALT+W or ALT+A
Delete a PhoneBook name (item)	CTRL+D
Add item right (outline note as subitem)	CTRL+R or select PhoneBook item and press ENTER
Show all PhoneBook names (items)	ALT+CTRL+A
Show or hide PhoneBook form	F2
Use the standard PhoneBook form	ALT+CTRL+1
Switch between the PhoneBook list and the PhoneBook form	F12
Use other PhoneBook forms (second through ninth created)	ALT+CTRL+2 through ALT+CTRL+9
Search in the PhoneBook	ALT+S (Then type search text and press ENTER)
Search for the next occurrence	ALT+N
Specify search options	ALT+CTRL+S
Specify address printing options	ALT+CTRL+P
Query by form	ALT+Q

To	Press/Click
Dial phone	CTRL+F3 or click right mouse button and choose command from pop-up menu

The Toolbar

To	Press/Click
Show or hide toolbar	Click Show/Hide Toolbar button (on status bar, left of date and time)
Add button to toolbar	Click right mouse button on icon in Repeat box and drag icon to desired toolbar location
Insert or remove space between toolbar buttons	SHIFT+click right mouse button between the toolbar buttons
Move toolbar button	Click right mouse button and drag
Move toolbar button groups	CTRL+click right mouse button and drag

The Folder Window

To	Press/Click
Display the Folder menu	ALT+L
Create a new folder	Click right mouse button and choose command from pop-up menu
Add folder(s) to any Notepad	Drag folder(s) from folder window to a Notepad or click right mouse button and choose command from pop-up menu
Add folder(s) to a scratch Notepad	Double-click folder name in the folder window (after you have chosen to assign folders)
Insert folder column(s)	Drag folder(s) from Folder window to column pane
Expand and collapse subfolders of a folder in the folder window	Click plus or minus icon
Change folder type	Click right mouse button and choose command from pop-up menu
Find folders	CTRL+F

To	Press/Click
Make folder(s) public	Click right mouse button and choose command from pop-up menu
Assign folders	Click to the left of the folder icons or click right mouse button and choose command from pop-up menu
Assign selected item(s) to folders by keys (after you have chosen to assign folders)	CTRL+A or click right mouse button and choose command from pop-up menu (Then use ARROW KEYS to select folder(s), and press ENTER twice)
Edit folders	Click the folder window title bar or double-click folder buttons (to the left of the folder icons) or click right mouse button and choose command from pop-up menu
View folder properties (after you have chosen to edit folders)	Click right mouse button and choose command from pop-up menu
Edit folder names in the folder window (after you have chosen to edit folders)	Double-click folder name
Delete folder(s) from the folder window (after you have chosen to edit folders)	CTRL+D or click right mouse button and choose command from pop-up menu

Appendix B. Glossary

Access Privileges

Access privileges allow you to control who has access to your *shared files* on the Workgroup Directory. You can specify general (or default) privileges, or you can grant special access privileges for each user.

Active view

A view must be active before you can work in it. To make a view active, click its tab. In a composite view, click anywhere within the border of the Calendar, PhoneBook, or Notepad you want to make active.

Add

To collect like *items* by dragging them into *folders,* thereby adding them to the folders. When you drag an item from any view into a folder in the folder window, the item remains in the original view as well.

Administrative Assistant

An individual who has been granted special privileges for another user. Administrative assistants can change schedules and respond to meeting requests for another user. A user can grant administrative assistant privileges to only one person at a time.

Alarm

An ECCO feature that lets you display a message or trigger an action associated with an *event* or any *item*. You can set an alarm to go off at the time of the event; minutes, hours, days, or weeks before or after the event; or any combination of those settings. You can also set alarms to display dialog messages, play sounds, and launch documents or batch files.

Alarm files

ECCO automatically saves all of your alarm settings (including text, date, time, alarm type, and so forth) in a special alarm file (ECCO.ALM). ECCO updates this file automatically each time you create a new alarm or change an existing alarm.

Alignment

The horizontal arrangement of text within the width of a *column.* You can align information in columns by centering, left-aligning, or right-aligning it.

Application Program Interface (API)

A standard used for communicating and exchanging information with other programs. ECCO's Dynamic Data Exchange (DDE) based API provides the ability to exchange information between ECCO and other Windows programs that support DDE. See API.ECO for a listing of programming commands.

Appointment

An item you type into the *Appointments section* of the *Calendar*. Other *items* that are associated with a time *value* are also appointments and appear in the Appointments section.

Appointment edit box

A value edit box for a date column. You can display the Date Settings dialog box from an appointment edit box by choosing INS. See also *value edit box*.

Appointment section

The area of the *Calendar* in which you schedule, view, and edit *appointments.*

Attribute

A formatting characteristic applied to text. Character style, such as bold or italic; font, such as Helvetica or Times Roman; point size; and color are all examples of formatting attributes.

Availability Database

ECCO saves all currently scheduled meeting times for all ECCO users in an ECCO Group Availability Database (ECCO_GRP.ADB) on the network server. Each time a user schedules a meeting, ECCO checks this database to determine the availability of the selected attendees. ECCO then displays this information in the Schedule Group Meeting dialog box.

Backup files

Using ECCO's automatic backup feature (default is enabled), ECCO creates a new backup copy (with the extension .BK1, .BK2, and so forth up to the number specified) of your Calendar, PhoneBook, and Notepad information each time you exit ECCO or save your files.

Busybar

The vertical bar you can display in the Sidebar of the *Calendar* window that shows you at a glance your scheduled *appointments*. Use the Busybar to change the time and duration of appointments. The block in the Busybar shows the time and the duration of each scheduled appointment. You can drag a Busybar block to change the time and duration of an appointment.

Calendar

In the Calendar, you can schedule *appointments*, remind yourself of upcoming meetings, set *alarms*, and add *tickler items* for important engagements. Using the group scheduling feature of ECCO, you can schedule *group meetings*.

Calendar/PhoneBook button

The button in the upper-right corner of both the *PhoneBook* and the *Calendar* that you choose to display the two views side by side. Drag any name from the PhoneBook to any day or time in the Calendar to automatically make an *appointment*.

Call logger

A feature that logs the time, date, and duration of your calls and stores the information in the Phone Log *column*.

Checkmark column or folder

A type of *column* or *folder* that displays checkmark values. For example, you might use a checkmark column to mark an item as personal. A checkmark folder is the default folder type.

Close box button

The button in the upper-left corner of any window and some dialog boxes that you choose to close the window or dialog box.

Collapse

To hide an item’s subitems. Do this by double-clicking an item bullet, or by choosing Show Sub-Items from the Item menu and then choosing Hide.

Column

A spreadsheet-style display that contains specific information about *items.* Column *values* can be *text, numbers, checkmarks, dates, pop-up lists,* or Gantt charts. A *column* displays *folder values* associated with the *folder* of the same name.

Column heading

The gray area at the top of a column. The column heading contains the name of the *column*. When you create a new column and assign it a heading, ECCO automatically makes the column into a new *folder* (with the same name) and adds it to the list of folders in the folder window under the “New Columns” folder. When you click a column heading with the right mouse button, the Column menu appears. To minimize a column, double-click its column heading.

Column pane

An area of each *view* in which you can display specific information about *items.* You can create *columns* that display *text, numbers, checkmarks, dates,* and Gantt charts.

Comma-separated values

A text file format that includes columnar data surrounded by quotation marks and separated by commas. For example: “James Monroe”, “212-555-6423”, “1234 Any Street”.

Common ECCO file

When a file is shared with privileges greater than See Available Time For Group Scheduling, ECCO creates a common file in the Workgroup Directory. This file has the extension .ECC and contains all public information.

Composite view

A *view* to which you have added one or more additional views. Using the Add View To Window command on the View menu, you add additional views to the one you are in, allowing you to see anywhere from two to four views side by side.

Context parent

Green-shaded *items* that would not ordinarily appear in a particular *Notepad* , but are included to provide context.

CSV

See *comma separated values*.

Cumulative label

A series of numbers and letters to the left of an *item* in a *Notepad.* For example, a cumulative fourth-level *outline label* might display “1.A.1.a.”, whereas a noncumulative fourth-level label would display only “a.” Used primarily to track item *levels* in long documents.

Date column or folder

A type of *column* or *folder* that lets you associate a date with each *item* you add to the folder. When you enter a date into a date column, you are both supplying a date for the item on the corresponding line and adding that item to the folder whose name appears as the heading of that column. Unless you specify otherwise, items with dates appear in the *Tickler section* of the *Calendar.*

Date Settings dialog box

The dialog box in which you can change the time and date of *appointments* as well as set *tickler item* options, *alarms*, and *recurring events.* Using the group scheduling feature of ECCO, you can schedule *group meetings.* To display the Date Settings dialog box when the *Calendar* is active, click an existing date or time.

Day, Week, Month, and Year buttons

Buttons at the far left of the *Navigator* that, when chosen, switch you between day, week, month, and year displays of your schedule. Located in the *Calendar.*

Detail

A way of displaying your *Calendar*. When you display the Calendar in detail, you see the *appointment* and *tickler items* for the selected week or month. You also see any *outline notes* and whether an appointment or tickler item is *recurring* or whether an *alarm* or *group meeting* has been set.

Detail/Summary button

Button to the right of the Day, Week, Month, and Year buttons that, when chosen, switches you between the *detail* and *summary* displays of the *Calendar*.

Embed

See *OLE object.*

ENT (Enter) button

A button that, when chosen, enters the specified action and closes the *value edit box.*

ESC (Escape) button

A button that, when chosen, cancels the specified action and closes the *value edit box*.

Event

An *appointment, group meeting,* or *item* that has a date associated with it. You can set *alarms* for events or set an event to recur at specified intervals. See also *recurring event*.

Export

To copy items from an ECCO files to a text file. See also *comma-separated values*.

Filter

A feature of ECCO Pro that limits the items displayed in a *view* according to user-definable *column* (or *folder*) criteria. For example, if you created a column titled "Priority," you could use a filter to display in the view only the items with a priority of "high."

Folder

Folders are containers of *items* used to collect and cross-reference related *items*. Whenever you create items in any of ECCO's *views*, you are actually adding them to a folder. For example, when you create an *appointment* in the *Calendar*, ECCO automatically adds that appointment item to a folder named "Appointments." Similarly, whenever you add a name to your *PhoneBook,* ECCO automatically adds that name to the PhoneBook folder.

- You can also drag any item to any number of additional folders in the *folder window*. When you do so, the item remains in its original location as well.
- You can see the items in any folder by double-clicking the folder to display it in a scratch view.

For a complete understanding of folders, see the chapter or online help on "Folders."

Folder button

A button along the left side of the *folder window* that, when chosen, displays the folder options pop-up menu. Using this menu, you can *add* selected *items* to *folders,* remove selected items from folders, or view folders' items in a Notepad. A checkmark on a folder button indicates that the selected items in the *active view* have been added to the corresponding folder.

Folder options pop-up menu

Using this menu, you can *add* selected *items* to *folders*, remove selected items from folders, or view folders' contents in a *Notepad*.

Folder value

A *folder* can store a *value* with each *item* it contains. A folder value gives you a way to associate an additional piece of information with each item. Because an item can be *added* to many different folders, each item can have many different values associated with it.

Folder window

A window on the left side of the main ECCO window that displays your *folders.* Use the folder window to

- *Add* new folders.
- Edit existing folders.
- View folder types.
- Change folder preferences.
- Add *items* to folders.
- Remove items from folders.
- Choose folders whose items you want displayed in a *Notepad.*
- Insert a folder into the *column pane.*

Form

A *template* that lists a set of *fields* and corresponding *values* that can be applied to an *item.*

Gantt column

A *column* type. Gantt charts are bar charts that display task or project start and finish dates and durations.

Group files

When you create a network file, ECCO saves your data in three files on the Workgroup Directory:

- ECCO saves your Calendar, PhoneBook, and Notepad information into the common ECCO file with the extension .ECC.

- Access privileges and the changes log are stored in an ECCO file with the same name, but with the extension .ECG. When other users share your group file, ECCO creates a link to the selected .ECG file. As a result, you can share parts of the group ECCO file — Calendar, PhoneBook, folders, Notepads, columns, and forms.
- When you create a public file, ECCO also creates an ECCO Group OLE Object file with the same name, but with the extension .ECB. This file contains all OLE objects embedded in the group file.

Group meeting

An *appointment* that involves several users. ECCO shows you when other users in your Workgroup Directory have appointments and meetings scheduled, allowing you to schedule group meetings.

Group OLE Object files

When you create a *public* file, ECCO also creates an ECCO Group OLE Object file with the same name, but with the extension .ECB. This file contains all *OLE objects* embedded in the *group file.*

Home folder

The *folder* in which an *item* originated. For example, the home folder for an item first entered in the *PhoneBook* is the PhoneBook folder. You can display home folders in the *column pane.*

Import

To bring a tab-separated file or CSV (*comma-separated values*) file from another program into ECCO. You import into the *active view.*

Initialization file

ECCO saves the path for your Workgroup Directory, user identification, and other program-specific settings in a special initialization file (ECCO.INI) in the Windows directory on your local drive. ECCO updates this file when you change network directories.

Initiator

The individual who initially schedules a group meeting. Only the initiator (or the *administrative assistant* appointed by the initiator) can cancel or reschedule a *group meeting.*

Item

The primary unit of information in ECCO. Each item is a distinct element and has a *item bullet* to its left. Items can have *values* (dates, numbers, and text) associated with them and may have *parent items* or *subitems,* which are themselves items.

Item bullet

The icon at the left of an *item* that can be used like a handle to move the item up, down, left, or right. Double-clicking an item bullet expands or hides the item's *subitems.* A black triangle at the lower-right corner of an item bullet indicates the item is *collapsed* and its subitems are hidden.

Label

See *outline label.*

Letter tab

The letters on the left side of the *PhoneBook* window. You choose a letter tab to display all *items* beginning with that letter. For more information, see Chapter 4, "The PhoneBook."

Level

The relative horizontal position of an item in an outline.

Link

See *OLE link.*

Main file

When you create a main file, ECCO automatically saves your *Calendar, PhoneBook, Notepad,* information and so forth in a file on the Workgroup Directory. The filename is based upon your mail user identification.

All *group meetings* and *appointments* that you schedule in your main file are recorded in the ECCO group availability, meeting, and user databases. You create a main file by selecting the This Is The Main Calendar And PhoneBook For <*Username*> option in the File Sharing & Access Privileges dialog box. (You can have only one main file.)

Make Private

An option that, when chosen, makes a *Notepad, folder, column,* or *form* unavailable for use by others in a *shared file.* This option is available only if you're using a shared file.

Make Public

An option that, when chosen, makes a *Notepad, folder*, *column*, or *form* available for use by others in a *shared file*. This option is available only if you're using a shared file.

Master file

ECCO creates a master file with the filename extension .ECG when you first set up for synchronization or when you first share a file. The master file holds a log of changes made to the shared file. When no longer needed, those changes are discarded. When sharing a file using ECCO's network features, ECCO creates the master file in the Workgroup Directory.

Meeting Database

ECCO saves information about all currently scheduled meetings in an ECCO Group Meeting Database (ECCO_GRP.MDB) on the network server. This database contains information about the *group meeting*, such as dates, meeting duration, subject of the meeting, attendees, attendees' status, notes, and so forth. Each time a user schedules a meeting, ECCO checks this database for current information about the meeting, and then displays this information in the public ECCO Calendar.

Minimized column

A *column* that has been narrowed. Minimized columns let you view more columns at once or hide the information in columns you don't currently need to see. You can skip (choose not to print) minimized columns when you issue a print command. To minimize or restore a column, double-click the heading at the top of the column.

Multiple-folder column

A column that displays in each cell a group of *folders* to which the *item* on the corresponding line has been *added*. These folders must be *subfolders* of the folder whose name appears in the *column heading*.

Navigator

A control in the *Calendar* that lets you move forward and backward by day, month, or year.

Network files

When you create a shared file, ECCO saves your data in three files on the Workgroup Directory:

- ECCO saves your *Calendar*, *PhoneBook*, and *Notepad* information into the common ECCO file with the extension .ECC.

- Access privileges are stored in an ECCO file with the same name but with the extension .ECG. When other users share your *group file*, ECCO creates a *link* to the selected .ECG file. As a result, you can share parts of the group ECCO file — Calendar, PhoneBook, Notepads, *folders*, *columns*, and *forms*.
- When you create a *public* file, ECCO also creates an ECCO Group *OLE Object* file with the same name but with the extension .ECB. This file contains all OLE objects embedded in the group file.

Notepad

A view showing one or more *folders* and the *items* in them. Each item in an outline can be repositioned to a different *level* of indentation to express major and minor points. Items can be expanded or collapsed to hide subordinate levels.

Number column or folder

A type of *column* or *folder* that lets you associate a number with each *item.* A number column can be used to display a number *value* for each item in a *view.*

OLE link

A dynamic link between the data in an ECCO file and a file that contains the same data in another program. Changes to the file in the other program are reflected in the data linked to it (the data in the ECCO file). If the ECCO file is open, the data in the ECCO file is automatically updated. If the ECCO file is closed, the next time you open it, you will be asked whether you want to update the linked data.

Original file

A file as it exists before file sharing and *synchronization* take place.

OLE object

An embedded object in an ECCO file. Double-click an embedded object to open the program in which the object was originally created. You can thereby edit or make changes to the object without leaving ECCO or affecting the original source file.

Other shared files

Other *shared files* are used primarily for sharing information about special group projects. You cannot schedule *group meetings* in these files; *appointments* that you schedule in this file are not recorded in the ECCO group databases. (You can have an unlimited number of other shared ECCO files, each with unique *Calendar*, *PhoneBook*, and *Notepad* information.)

Outline label

The number or letter to the left of an *item bullet* in a *Notepad.*

Outline note

An outline *item* added to a *PhoneBook* entry or *Calendar* item. To create an outline note, select the item for which you want to create an outline note, and then press the ENTER key. Press ENTER again to create more notes. Use the TAB key to indent items and SHIFT+TAB to promote them. Double-click any item bullet to collapse or expand an item's subitems.

Outline style

A set of character-formatting *attributes* that applies to a particular *level* of *item* in a *view*. Using different outline styles for each level makes it easier to differentiate between your outline levels.

Parent item

An *item* that has another item subordinate to it. The subordinate item is called a *subitem.*

Phone dialer

A *PhoneBook* feature that dials a phone number for you. See also *telephone button.*

PhoneBook entry form

An entry form in the *PhoneBook* in which you *add* new or modify existing PhoneBook *items.*

PhoneBook

Use the PhoneBook to store phone numbers, addresses, and other information about your friends, clients, business contacts, and others.

Pop-up list column or folder

A type of *column* or *folder* that lets you associate user-defined *values* with each *item.* For example, a pop-up list for a column or folder titled "Priority" might include the values High, Medium, and Low. When you select a cell in the "Priority" column, you can quickly associate the degree of priority with the item on the corresponding line.

Public

A term describing a file, *Notepad, folder, column,* or *form* that has been made accessible to others in a *shared file.* See also *Make Public*.

Recurring event

An *event* that occurs at regular intervals. For example, if you have an *appointment* that occurs every Wednesday morning, you could set a recurring event in the *Calendar* so that ECCO automatically schedules your appointment on Wednesday of each week. You can also make *alarms* and to-do's recurring.

Repeat box

The box in the upper-right corner of the ECCO program window when the *toolbar* is displayed that displays the icon representing the command last chosen. You can repeat a command by clicking the icon with the left mouse button. You can customize your toolbar by clicking the icon in the repeat box with the right mouse button and dragging the icon onto the toolbar.

Replica

A special copy of a file that can be *synchronized* with the original file. You can have up to 250 replicas of a file, all of which can be synchronized in a variety of ways.

Search Results view

The ECCO *view* that displays the results of a search.

Shared File

A file that has been made available to the Workgroup Directory. Shared files can be accessed by any ECCO user who has access to this directory.

Shooter

A tool that sends information from other programs to ECCO, from ECCO to other programs, or between two other programs. Using the Shooter, you can insert, *link,* and *embed* objects and selected information from other programs to or in ECCO *views* or *folders,* from ECCO views to other programs, or between other programs. Choose the Shooter icon to display its menu.

Sidebar

The area at the far left side of the *Calendar* that displays either the day, week, or month Busybar, or a 3-month thumbnail.

Status bar

The bar at the bottom of the ECCO program window that displays the date, the time, and messages to help you use ECCO, such as information about the selected command.

Status area

The area in the *Calendar* that lies to the right of Calendar *items*. It shows whether an *appointment* or *tickler item* is *recurring* and whether an *alarm* or *group meeting* has been set.

Subfolder

A *folder* that is subordinate to another folder in the *folder window*. In other words, a folder that is below and to the right of another folder.

Subitem

An *item* that is subordinate to another item. In other words, an item below and to the right of another item. See also *parent item*.

Submenu

A menu that opens from another menu when you choose a command.

Summary

A graphical way of displaying the *Calendar* in date squares that resemble a paper "planner," with *appointments* and *tickler items* shown in each square. When you display your Calendar in summary, you do not see *outline note*s, nor can you see whether an appointment or tickler item is *recurring* or whether an *alarm* or *group meeting* has been set.

Synchronization

The matching and updating of data between the master and remote ECCO files so that all data in these files is consistent. ECCO provides three methods of synchronization: automatic synchronization, synchronization using email, and manual synchronization.

Telephone button

A button located in the *PhoneBook toolbar* that, when chosen, displays the Dialer/Call Logger dialog box.

Template

A preformatted ECCO file that may contain *Notepads*, *folders*, *columns*, *forms*, and *filters* to help you become productive quickly. ECCO comes with a variety of templates to help you get started. Each template includes customized Notepads, folders, columns, forms, and filters. Templates have the file extension .ECT.

Text column or folder

A type of *column* or *folder* that lets you enter or display text for each *item* in a *view*. Using a text column, you can associate additional text or notes with each item.

Text touch-up

A group of character-formatting *attributes* that you name and store. Apply text touch-ups to a range of selected text to override *outline styles*.

Tickler item

A note, reminder, or *appointment* displayed in the *Tickler section* of the *Calendar* that “tickles,” or jogs, your memory.

Tickler section

Area of the *Calendar* in which reminders that “tickle” your memory—tasks you need to do or upcoming *appointments* you need to prepare for—are displayed.

Toolbar

An ECCO feature that gives you quick access to frequently used commands. The toolbar can be displayed across the upper part of the ECCO program window, ECCO *views*, and the *Shooter*.

Top-level item

An *item* located at the highest (left-most) level of an outline. When you type top-level items in a *Notepad*, they are automatically *added* to the *folder*.

User Database

ECCO saves information about ECCO users who share a directory on the network server in an ECCO Group User Database (ECCO_GRP.UDB) on the network file server.

User Identification

When you choose a Workgroup Directory, ECCO adds your user identification to the *User Database*. (Your ECCO network user identification is based on your mail system user name and password.)

Value

A number, date, or additional text associated with an *item*. You can associate any number of values with an item by entering those values into any number of *columns*.

Value edit box

A pop-up box in which you enter or edit text, numbers, appointment times, dates, and pop-up list *values.* The value you enter is associated with the selected *item(s).* See also *appointment edit box*.

View

A window displaying the Calendar, the PhoneBook, or a Notepad. Every ECCO file contains a *Calendar,* a *PhoneBook,* and any number of *Notepads.* See also *composite view*.

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Easy Acrobat Reader Instructions

These instructions provide simple help in using Adobe Acrobat to read PDF files. For more detailed information, consult the help file that comes with the reader. You access this file from the help menu (the question mark) on a Macintosh or from the Acrobat Help menu on a PC. This guide addresses three topics:

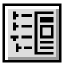
- What's on your desktop
- Managing your view of a document
- Navigating around your document

Click on one of these topics to get more information.

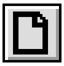
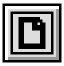
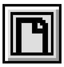
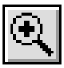
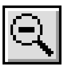
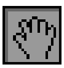
The fastest, easiest way to improve the legibility of any PDF file is to enlarge your view of the file. The magnification icon, 

, in the status bar at the bottom of the window, displays the current magnification. Click the icon to select a greater magnification or enter a desired magnification amount.

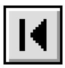
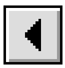
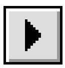
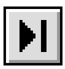
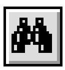
What’s on your desktop

Click Here	To Do This
	See **only** the document’s page without Bookmarks or Thumbnails. Use this button to use the maximum screen area to read pages.
	See the bookmarks (the document’s table of contents) **and** the document’s page. Use this button to jump from one chapter or section to another. To adjust the screen areas used for the bookmarks and the page, position the cursor over the vertical line between the areas and drag to the left or the right.

Managing your view of a document

Click Here	To Do This
	See each page at 100% magnification.
	See all of each page. The magnification changes to get all of the page, including all margins, on the screen.
	See all of the page’s width, including left and right margins. Use the Option key (Macintosh) or Control key (Windows) to eliminate the margins. ***This is the easiest way to get the most magnification that will still show all of the text or graphics across a page.***
	Zoom in on a page by doubling the magnification.
	Zoom out on a page by halving the magnification.
	Choose the magnification from 50% to 800% or enter an amount.
	Move the page around so you can see a different part of it, with scrolling or changing the magnification.

Navigating around your document

Click Here	To Do This
	Go to the top of the page that has the text next to the bookmark. Note that you first must be displaying bookmarks.
	Go to the **first** page of the document.
	Go to the **previous** page of the document.
	Go to the **next** page of the document.
	Go to the **last** page of the document.
	Find the first page that has specified text on it.